AGENDA

Monday, October 8, 2007
1:00 p.m.

Room 433, Blatt Building

I. Welcome and Introductions   Harold Stowe
    Barbara Hairfield, Appointee of the President Pro Tempore of the Senate
    Katrina Greene, Director of Evaluation

II. Approval of the Minutes of the June 12 Meeting   Harold Stowe
    Approval of the Minutes of the August 13-14 Meeting

III. Subcommittee Reports
    A. Academic Standards and Assessments   Thomas DeLoach
        Action: Recommendations regarding the US History
                End-of-Course Assessment
        Action: Recommendations regarding the SC-Alternate Assessment

    B. EIA and Improvement Mechanisms   Robert Daniel
        Information: Meeting with Dr. Gary Henry, UNC-Chapel Hill
        Action: Recommendations regarding the Teacher Loan Program
        Information: Recommendations regarding Teacher Recruitment
                    and Retention

    C. Public Awareness   Michael Brenan
        Information: PAIRS Update

IV. General Discussion   Harold Stowe
        Action: Approval of the 2007-2008 Objectives

10:00 a.m.   SPECIAL SESSON

Members present: Alex Martin, Michael Brenan, Bill Cotty, Thomas DeLoach, Dennis Drew, Sen. Mike Fair, Sen. Wes Hayes, Buffy Murphy, Supt. Jim Rex, Neil Robinson, Kristi Woodall

Between 10:00 a.m. and 12:00 p.m. the Education Oversight Committee (EOC) participated in the State Board of Education (SBE) meeting to hear the report and recommendations on computer-based or computer-adaptive testing from Data Recognition Corporation (DRC). Members were provided a copy of the draft report; the final report is to be available on June 30, 2007.

LUNCH

EOC and SBE members continued with lunch and informal discussions

1:00 p.m.   REGULAR MEETING

Members present: Alex Martin, Michael Brenan, Bill Cotty, Thomas DeLoach, Dennis Drew, Sen. Mike Fair, Sen. Wes Hayes, Buffy Murphy, Neil Robinson, Kristi Woodall

I.   Mr. Martin called the meeting to order.

II.   Mr. Martin asked for approval of the minutes as distributed. The minutes were approved.

III.   Subcommittee Reports
A.   Academic Standards and Assessments: Mr. DeLoach reported on behalf of the subcommittee.
(1) Mr. DeLoach asked Mr. Potter to explain the action item on the use of end-of-course tests in school ratings. Mr. Potter reviewed the four recommendations addressing the use of end-of-course tests in middle school ratings, for courses taken in the virtual school, for courses taken as dual credit and for ninth grade only schools. The recommendations were approved as presented;
(2) On behalf of Mr. DeLoach, Dr. Horne explained the changes to the mathematics content standards as given first reading approval by the State Board of Education. These included changes to the multiplication facts to be learned at grade 3 and the use of decimal equivalents of common fractions. The standards were approved;
(3)   Mr. DeLoach presented a status report on the English language arts (ELA) standards, with Dr. Horne responding to questions as appropriate. The State Department of Education is conducting a pilot of the ELA standards through the February 2008 and anticipates presenting standards to the SBE for first reading in March 2008. Members discussed ways in which to make their views known earlier and ways to enhance dialogue between the EOC and SBE within the process. Sen. Fair asked about the Administrative Procedures Act timelines and its alignment with the standards review process;
(4) Mr. DeLoach indicated that the subcommittee had reviewed the recommendations from the cyclical review of the Palmetto Achievement Challenge Tests and deferred action until a number of questions could be explored and the recommendations that may result from Supt. Rex' task forces heard.

B.   EIA and Improvement Mechanisms: Mr. Robinson reported on behalf of the subcommittee.

      (1) Mr. Robinson outlined the proposal for a triennial evaluation plan and presented two recommendations (adoption of the plan and elimination of several reports currently required). The recommendations were approved as presented;

      (2) Mr. Robinson drew members' attention to information on the FY2008 budget, as yet not concluded;

      (3) Mr. Robinson presented the format by which information is to be collected and used in the development of the FY09 budget recommendations. The electronic format should reduce requirements on other agencies as well as provide consistent information;

      (4) Mr. Robinson reviewed the report on the flexibility proviso, noting that only about 1 percent of state funds are transferred from one category to another.

C.   Public Awareness: Mr. Martin reported on behalf of the subcommittee.

      (1) He presented the detailed analysis of responses to the parent survey, noting general trends that persist over time;

      (2) Mr. Martin outlined the FY08 communications plan and remarked on its consistency with the EOC's desire for greater impact.

      (3) Mr. Martin introduced Trip DuBard, SBE member and president of The School Foundation (benefiting Florence One). Mr. DuBard outlined a fall event in which presidential candidates are asked to discuss their views on public education. He is requesting EOC endorsement and participation. Members deferred action and expressed that the activity may fall outside of the EOC mission but wished to convey their encouragement.

IV.   Ad Hoc Committee on Computer-based, Computer Adaptive Testing. Mr. Martin asked for volunteers. Mr. Brenan and Mr. Robinson volunteered. Rep. Walker was nominated to serve with them on the ad hoc group. The group is to meet with the Advisory Panel and to offer recommendations at the August EOC meeting.

V.   General Discussion: Members expressed that the joint meeting with the SBE had gone well and that the two groups should meet jointly at least once or twice a year.

The meeting adjourned at 3:00 p.m.

SOUTH CAROLINA EDUCATION OVERSIGHT COMMITTEE

Minutes of the Meeting
August 13-14, 2007

<u>Monday, August 13, 2007</u>
Members present: Mr. Stowe, Mr. Martin, Mr. Brenan, Rep. Cotty, Mr. Daniel, Mr. Drew, Sen. Fair, Sen. Hayes, Mrs. Murphy, Rep. Neal, Supt. Rex, Mr. Robinson, Rep. Walker, and Dr. Woodall

Welcome and Introductions: Mr. Stowe welcomed members and guests to the meeting. He outlined the purpose of the meeting as setting priorities for the coming year, encouraging engagement in the process of improvement and extending our commitment to strong schools. He asked Dr. Anderson to comment on several items. Dr. Anderson informed members of the progress on the Public Choice Innovation Schools, the contract with Louisiana State University on the ratings methodology, the addition of Katrina Greene to the EOC staff and the publication of the Back to School newspaper insert.

I.   Improving Quality Data: Mrs. Elizabeth Carpentier, Deputy Superintendent from the State Department of Education outlined efforts undertaken by the SDE in the last twelve months to improve the accuracy of data submitted by schools and districts and published by the SDE. These efforts include implementation of the Student Unique Numbering System (SUNDS), the Longitudinal Data System and increased training for those who enter and utilize the data at the local district and school level. Mrs. Carpentier indicated the SUNS system included students in the 4K as well as K-12 programs and was 98.2 percent implemented. EOC members asked about implementation of SUNS in adult education so that the graduation rate could be captured. Dr. Janet Rose and Ms. Elainna Rickenbacker, Charleston County School District, presented two aspects of the Charleston process: the ARAS system for predicting students with difficulties and the processes by which data are verified routinely and errors corrected.

II.   Child Development Education Pilot: Mr. David Potter and Mrs. Melanie Barton, EOC staff, presented the interim report on the Child Development Education Pilot Program (CDEPP). The interim report outlined the enrollments, administrative issues and start up challenges for the first year. A number of changes are to be implemented in the second year of the pilot, including the expansion to six more districts, attention to students with disabilities and/or non-English speaking students, and revisions to administrative procedures. The January 2008 report should include enrollments for the 2007-2008 year, student assessment information and teacher information. Members raised questions or commented on the grants for equipment and materials, the need for statewide implementation and the relationship of DSS licensure to program approval. At least one member suggested the program would be strengthened by wrap-around services and others asked if the process by which private providers are recruited is sufficiently robust.

III.   Making and Sustaining Improvements: Dr. Frank Brown, MarketSearch, presented the report on executive interviews with superintendents in districts receiving technical assistance. He identified teacher recruitment and retention, the balance of autonomy and intervention and the costs of sustaining a strategy after state funds are removed as areas of continuing concern. Superintendents also discussed the challenge of meeting the moving targets under NCLB and the EAA ratings.

Dr. Rainey Knight, Darlington County Schools, and Dr. John Kirby, Dillon School District Three, talked with members about the changes and improvements in the districts in which they are superintendents. Dr. Knight pointed out that progress has been much slower than she ever anticipated; she focuses on creating conditions in which teachers can teach well. Dr. Kirby pointed out the need for strong building level teams, emphasis on technology literacy and the challenges of

student performance in the middle schools. Each questioned the capacity of PACT to identify and report student performance at the middle grades. They expressed strong feelings that teacher retention is more important than teacher recruitment. The superintendents expressed concern that the academic plans are not working well. Dr. Kirby talked about the need for a strong statewide vision and the role of the governor in creating and communicating that vision. When asked about teacher retention, Dr. Knight described the Darlington salary structure but indicated that a supportive administration and a teaching culture were as important as money. Dr. Kirby described the need for teacher housing and his district's efforts to repay loans, help with living expenses, adding merit pay and providing incentives for attendance.

IV.   Task Force on Teacher Recruitment/Retention: Dr. Paul Horne, EOC staff, updated members on the work of the task force which is to be reported to the full committee in October. The task force has examined data systems, engagement of teacher preparation institutions and total compensation (more than salary) packages. Members asked for more information on the Georgia higher education goals for teacher preparation.

V.   US History End-of-Course Test: Mr. Potter distributed materials on the US History End of Course Test and described the lack of alignment among the course as written, the course as taught and the course as tested. Responses to the teacher survey were shared. The EOC staff is sharing the information with the members of the Instructional Roundtable on August   16 and is to bring recommendations to the Academic Standards and Assessments Subcommittee in September.

Tuesday, August 14, 2007

Members present: Mr. Stowe, Mr. Martin, Mr. Brenan, Rep. Cotty, Mr. Daniel, Mr. Drew, Sen. Fair, Sen. Hayes, Rep. Neal, Mr. Robinson, Rep. Walker, and Dr. Woodall

I.   Executive Session-Personnel Matter: Mr. Stowe called for an Executive Session. Following the lifting of the veil, Mr. Martin moved that Dr. Anderson's contract be extended for a period of three years under the terms discussed. The members approved the extension.

II.   Community Engagement-Mayor's Coalition to Prevent Juvenile Crime: Mayor Frank Willis (Florence) and Jim Shaw, Florence School District One, presented information on the community effort that has reduced gang activity and juvenile crime and increased school performance. The effort has brought together public and private groups to focus on these issues and build a comprehensive response to the needs. The Mayor and Coalition members are available to meet with local community leaders and officials around the state and explain how they have built the coalition and how it is successful.

III.   Consensus Statements on Testing: Mr. Brenan drew members' attention to the report of the Ad Hoc Committee on Computer Based/Computer Adaptive testing. Members agreed with the recommendations regarding infrastructure development. After much discussion, members agreed with the Ad Hoc group and recommended that a statement of direction and coordination across school districts is necessary, with a strong focus on instruction. They requested that their concerns be developed into recommendations to the General Assembly.

IV.   Distribution of NBPTS Teachers: Mrs. Barton presented a model for increasing the number of NBPTS teachers in rural South Carolina. Members questioned the purpose of NBPTS certification, performance linkages to student achievement, and concerns with rising financial commitment to the program. Prior to any decisions, the members indicated the need for information on the assignments of those receiving the state supplement and their retention in the profession. Rep. Cotty suggested that any action would require three years' notices and that perhaps the current

supplement should be divided into three components (certification, classroom assignment and working in a high poverty district). Members asked that this information and other alternatives be developed over the 2007-2008 year.

V.   Priorities and Objectives for 2007-2008: Mr. Stowe asked that all business members serve on the Public Awareness Subcommittee and that Mr. Brenan serve as chair of that subcommittee.

Rep. Neal asked that the EOC's community involvement initiative expand to include building coalitions and/or providing information about initiatives such as the Mayor's Coalition in Florence to communities across South Carolina. Some questioned the capacity and role of the EOC in this effort. There was discussion of the EEDA regional education coalitions and their responsibility in this area as well as work conducted by the After School Alliance. Rep. Neal emphasized the responsibility of the EOC to use its bully pulpit to communicate the importance of these initiatives. Sen. Fair recommended this project be given to the Public Awareness Subcommittee to determine the capacity and costs of this effort.

In setting priorities for 2007-2008, the EOC asked that objectives be structured around the NBPTS questions, the computer infrastructure needed in schools, community collaborations, performance in the middle grades and early education. Several members asked that Judge Cooper's order be reviewed and that we examine the impact of current improvement efforts on the lowest performing 8-10 districts, including a community appraisal. Mr. Stowe emphasized the need to set a substantive goal for graduation rate and to continue to support the innovation initiatives. Other members suggested that we need to talk with deans of colleges of education and with principals about the mismatch between the teacher graduate and the classroom so that the problem can be defined clearly.

Dr. Anderson brought up concerns about the increase in rigor and the need for EOC clarity. Members indicated the importance of staying with the 2010 goal, but expressed strong concern about polarizations and the inability of groups with differing views to discuss alternatives. After discussion of the link between the NCLB Adequate Yearly Progress designation and the state ratings, Rep. Cotty moved to sever the linkage. The motion passed.

Dr. Anderson is to provide draft objectives for consideration at the October meeting.

The Meeting adjourned at 12:35 p.m.

EDUCATION OVERSIGHT COMMITTEE

Subcommittee: <u>Academic Standards and Assessments</u>

Date: <u>October 8, 2007</u>

<u>REPORT/RECOMMENDATION</u>
Review of the U.S. History and the Constitution End of Course Field Test

<u>PURPOSE/AUTHORITY</u>
Section 59-18-320. (A) After the first statewide field test of the assessment program in each of the four academic areas, and after the field tests of the end of course assessments of benchmark courses, the Education Oversight Committee, established in Section 59-6-10, will review the state assessment program and the course assessments for alignment with the state standards, level of difficulty and validity, and for the ability to differentiate levels of achievement, and will make recommendations for needed changes, if any. The review will be provided to the State Board of Education, the State Department of Education, the Governor, the Senate Education Committee, and the House Education and Public Works Committee as soon as feasible after the field tests. The Department of Education will then report to the Education Oversight Committee no later than one month after receiving the reports on the changes made to the assessments to comply with the recommendations.
Section 59-18-320 (C). After review and approval by the Education Oversight Committee, the end of course assessments of benchmark courses will be administered to all public school students as they complete each benchmark course.

<u>CRITICAL FACTS</u>
The U.S. History and the Constitution end of course field test was administered Spring 2006. Recommendations regarding the test must be communicated to the SC State Department of Education, which must respond within one month. State assessments must be reviewed and approved by the Education Oversight Committee.

<u>TIMELINE/REVIEW PROCESS</u>
The U.S. History and the Constitution field test was reviewed by the EOC in December 2006 and recommended that the test continue as a field test and that teachers be surveyed regarding their coverage of the course standards in instruction. The survey results indicated that teachers did not have sufficient time to cover all the standards adequately and were not teaching all of the standards.

<u>ECONOMIC IMPACT</u>

    Cost:

    Fund/Source:

<u>**ACTION REQUEST**</u>

☒ **For approval**   ☐ **For information**

<u>**ACTION TAKEN**</u>

☐ **Approved**   ☐ **Amended**

☐ **Not Approved**   ☐ **Action deferred (explain)**

MEMORANDUM

TO: Full Committee

FROM: David Potter
             Director of Research

DATE: September 4, 2007

Subject: Review of the U.S. History and the Constitution End of Course
              Field Test

The Education Oversight Committee (EOC) is charged in the Education Accountability Act to review the field tests for new assessments in the state assessment program:

> "After the first statewide field test of the assessment program in each of the four academic areas, and after the field tests of the end of course assessments of benchmark courses, the Education Oversight Committee, established in Section 59-6-10, will review the state assessment program and the course assessments for alignment with the state standards, level of difficulty and validity, and for the ability to differentiate levels of achievement, and will make recommendations for needed changes, if any. The review will be provided to the State Board of Education, the State Department of Education, the Governor, the Senate Education Committee, and the House Education and Public Works Committee as soon as feasible after the field tests. The Department of Education will then report to the Education Oversight Committee no later than one month after receiving the reports on the changes made to the assessments to comply with the recommendations." (Section 59-18-320 A)

The EOC also has a role in the adoption of state assessments:

> "Any new standards and assessments required to be developed and adopted by the State Board of Education, through the Department of Education, must be developed and adopted upon the advice and consent of the Education Oversight Committee." (Section 59-18-320 D)

In December 2006 the EOC reviewed the U.S. History and the Constitution End of Course field test and adopted the following recommendations:

1.   Continue the field test of the U.S. History and the Constitution end of course test during 2006-2007 by administering the currently prepared draft operational forms to students enrolled in the course. Monitor the performance of students on the U.S. History and the Constitution tests administered in the 2006-2007 school year and evaluate the technical characteristics of the items and the performance standards in Summer 2007 for possible revision.

2.   In cooperation with the State Department of Education, survey U.S. History and the Constitution teachers in Spring 2007 to describe their understanding and use of the U.S. History and the Constitution standards and relate the results to student performance.

In April and May 2007 a survey regarding the course academic standards was distributed to the 633 teachers of the U.S. History and the Constitution course identified by 84 of the 85 school districts in South Carolina. A total of 312 teachers (49.3%) responded to all the survey questions. The teachers' responses to the survey were summarized and distributed to EOC members at their August 13, 2007 meeting. In addition, the survey results were distributed to the members of the Instructional Leaders' Roundtable and EOC staff discussed the findings with them at their August 16, 2007 meeting.

Strengths identified in the U.S. History and the Constitution End of Course test:

- o The test is well-aligned to the academic course standards;
- o The cognitive demands of the test items are well-aligned with the rigorous academic course standards;
- o The test has adequate technical characteristics, although many of the test items are difficult (the average score on the field test was 41% correct);
- o The test can provide a measure of accountability for implementation of high academic standards.

Concerns Identified:

The difficulty of the test diminishes its effectiveness to "differentiate levels of achievement" (Section 59-18-320 A). The survey of U.S. History and the Constitution teachers in May 2007 and subsequent discussions with members of the Instructional Leaders' Roundtable suggest the following factors accounting for the low student achievement observed:

- o There is poor alignment between the content of the standards and the content of classroom instruction;
- o Teachers reported several factors related to time which adversely affect students' learning of the course standards:
  - ✓ There is too little time to teach all of the standards, especially in one-semester "block" classes;
  - ✓ There is also too little time to teach for students to attain the higher levels of understanding required for the course standards and the test;
  - ✓ Some teachers report concerns that the test is administered too soon before the end of the semester to complete instruction on all of the standards;

- o Teachers reported they need help with determining an effective pace for teaching the course standards, especially when time is limited;
- o Teachers reported that support materials for professional development are not available or are inadequate;
- o Students may not be motivated to perform well on the tests when there are no perceived consequences to them for poor performance or benefits for high performance.

Recommendations:

1. The State Department of Education (SDE) should take actions to improve the alignment among the U.S. History and the Constitution course standards, the instruction of those standards, and the End of Course test. Prior to EOC approval the SDE should provide evidence for the enactment of those actions to the EOC. The actions to improve the alignment may include, in addition to other possible activities:
   - ✓ Examine the course standards and End of Course test to identify or affirm the essential content to be learned and tested;
   - ✓ Complete the development of the Teacher's Guide, including guides for effectively pacing instruction, to the U.S. History and the Constitution course standards and End of Course test.

2. Continue the administration of the U.S. History and the Constitution End of Course test as a field test and provide feedback to schools and districts on the performance of their students.

3. The actions undertaken to improve the alignment among the standards, instruction, and the test should be accomplished by June 2008 to allow for professional development activities with teachers during Summer 2008.

As specified in Section 59-18-320 A, the SDE must respond to recommendations regarding the field test made by the EOC within one month. The EOC may approve the use of the test based upon the response from the SDE.

EDUCATION OVERSIGHT COMMITTEE

Subcommittee: <u>Academic Standards and Assessments</u>

Date: <u>October 8, 2007</u>

REPORT/RECOMMENDATION
Review of SC-Alternate ELA and Mathematics Assessments

PURPOSE/AUTHORITY
Section 59-18-320. (A) After the first statewide field test of the assessment program in each of the four academic areas, and after the field tests of the end of course assessments of benchmark courses, the Education Oversight Committee, established in Section 59-6-10, will review the state assessment program and the course assessments for alignment with the state standards, level of difficulty and validity, and for the ability to differentiate levels of achievement, and will make recommendations for needed changes, if any. The review will be provided to the State Board of Education, the State Department of Education, the Governor, the Senate Education Committee, and the House Education and Public Works Committee as soon as feasible after the field tests. The Department of Education will then report to the Education Oversight Committee no later than one month after receiving the reports on the changes made to the assessments to comply with the recommendations.
Section 59-18-320 (C). After review and approval by the Education Oversight Committee, the end of course assessments of benchmark courses will be administered to all public school students as they complete each benchmark course.

CRITICAL FACTS
The SC-Alternate ELA and Mathematics field tests were first administered Spring 2006 and revised for the Spring 2007 administration. Recommendations regarding the test following the EOC review must be communicated to the SC State Department of Education, which must respond within one month. State assessments must be reviewed and approved by the Education Oversight Committee.

TIMELINE/REVIEW PROCESS
The SC-Alternate assessments in ELA and Mathematics are intended for administration to students having such severe disabilities that they cannot participate in the PACT or HSAP testing programs. The assessments are administered individually and are designed to assess a broad range of skills expected in the special student population. The SC-Alternate assessment alignment with the academic standards appropriate for students having severe disabilities was assessed by an independent group of experts at the University of North Carolina-Charlotte and at Western Carolina University. The technical aspects of the assessments were evaluated by a measurement expert at the University of South Carolina.

ECONOMIC IMPACT

    Cost:

    Fund/Source:

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ACTION REQUEST

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☒ **For approval**   ☐ **For information**

<div align="center">

ACTION TAKEN

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☐ **Approved**   ☐ **Amended**

☐ **Not Approved**   ☐ **Action deferred (explain)**

2007-2008

SC-ALTERNATE ENGLISH LANGUAGE ARTS & MATHEMATICS ASSESSMENTS

From The Division of Accountability

SC EDUCATION
OVERSIGHT COMMITTEE

Reporting facts. Measuring change. Promoting progress.

Review of the SC-Alternate English Language Arts and Mathematics Assessments
Executive Summary

This report summarizes the results from studies of the South Carolina Alternate Assessment (SC-Alt) English Language Arts (ELA) and Mathematics field tests administered in Spring 2006 and the revised assessments administered in Spring 2007. The studies were conducted under the auspices of the Education Oversight Committee (EOC) as part of its responsibilities listed in the Education Accountability Act of 1998 (EAA):

> After the first statewide field test of the assessment program in each of the four academic areas, and after the field tests of the end of course assessments of benchmark courses, the Education Oversight Committee, established in Section 59-6-10, will review the state assessment program and the course assessments for alignment with the state standards, level of difficulty and validity, and for the ability to differentiate levels of achievement, and will make recommendations for needed changes, if any. The review will be provided to the State Board of Education, the State Department of Education, the Governor, the Senate Education Committee, and the House Education and Public Works Committee as soon as feasible after the field tests. The Department of Education will then report to the Education Oversight Committee no later than one month after receiving the reports on the changes made to the assessments to comply with the recommendations. (Section 59-18-320 A)

The report describes the SC-Alt ELA and Mathematics assessments, describes the studies conducted for this review, presents the findings from the studies, and makes recommendations regarding the assessments.

The SC-Alt ELA and Mathematics assessments are designed for administration to students with significant cognitive disabilities. Students with significant cognitive disabilities function below grade level expectations and have levels of disabilities such that they cannot participate in the regular administrations of the Palmetto Achievement Challenge Tests (PACT) or the High School Assessment Program (HSAP) assessments, even with test accommodations or modifications. Federal No Child Left Behind (NCLB) and Individuals with Disabilities Education Act (IDEA) legislation require that all students be tested and require that states provide an alternate assessment for students with significant cognitive disabilities. The students tested with the SC-Alt ELA and Mathematics assessments represent approximately 0.5% of the total student population in the grade levels tested. The majority of the students to whom the SC-Alt is administered have disabilities classified as Trainable Mental Disability, Profound Mental Disability, or Autism.

The SC-Alt is intended to replace current PACT-Alternate assessments (for grades 3 through 8) and HSAP-Alternate assessment (for grade 10). The SC-Alt assessments are needed to replace PACT-Alt and HSAP-Alt because of changes and clarifications in NCLB regulatory guidance and the reauthorization of IDEA. These changes to federal legislation regarding students with significant cognitive disabilities require that instruction and assessment for these students be based on the grade level academic standards for the grade in which the student is enrolled, although they may be at less complex levels or may have an emphasis on prerequisite skills. NCLB guidance also allows for assessments to be linked to grade bands as these students do not typically make the same level of progress from year to year as students in the general assessment.

The SC-Alt ELA and Mathematics assessments are individually administered to students by teachers during a six- to seven-week window during the Spring of the school year. Each SC-Alt

ELA and mathematics test form consists of twelve performance tasks containing four to eight test items each. There are three forms of the test: one for administration to students aged 8 to 10 years (elementary school grades 3 through 8); one for students aged 11 to 13 years (middle school grades 6 through 8), and one for students aged 15 years (high school grade 10). The test questions are scripted for standardization of administration and administered and scored by the student's teacher; a trained adult monitor unrelated to the student is also present during the test administration.

Two sets of studies were analyzed for the review of the SC-Alt ELA and Mathematics field tests:
- studies of the alignment between the SC-Alt ELA and Mathematics assessments and the state academic standards conducted by University of North Carolina-Charlotte and Western Carolina University professors of curriculum and special education, in cooperation with the South Carolina State Department of Education (SDE) and the National Alternate Assessment Center (Flowers, Browder, Wakeman, & Karvonen, April 2006);
- a technical review of the task and item data from the 2007 test administration conducted by a professor of educational research and assessment at the University of South Carolina.

In addition, EOC staff reviewed and analyzed information and documentation provided by the SDE about the SC-Alt ELA and Mathematics tests.

Conclusions

The studies conducted in this review identified a number of strengths of the SC-Alt ELA and Mathematics alternate assessments:

- ✓ The assessments provide accountability and information for instructional improvement for students with significant cognitive disabilities who would not otherwise be assessed in the state testing programs, even with test accommodations and modifications;
- ✓ With the exception of the ELA Research standard, the assessments are aligned with the same grade level academic standards as for all students, although at levels of complexity appropriate for the diversity of cognitive functioning observed among students with significant cognitive disabilities;
  - ○ The rationale for not assessing the ELA Research standard which was provided by the SDE and its advisory committee indicated that the Research standard was more appropriately assessed in the course of classroom instruction;
- ✓ The assessments address increasingly complex and more difficult skills across student age levels and have been designed to provide a vertical scale to measure growth;
- ✓ The items in the assessments have a wide range of difficulty and the tests are able to discriminate between high and low levels of ability;
- ✓ The assessments are individually administered by the students' teachers in the familiar context of the classroom;
- ✓ The assessment formats allow students to respond to the items using the communication modes the student uses during instruction, such as oral response, pointing, use of eye gaze, use of a response card, sign language, or an augmentative communication device;
- ✓ The assessments are scripted, their administration and scoring is observed by monitors, and the teachers and monitors administering the assessments undergo training to ensure that the assessment administration is standardized and the results are valid measures of the student's ability;

✓ The assessments are administered over a six- to seven-week period, providing flexibility and opportunities for maintaining student motivation and interest and reducing student fatigue;

✓ The procedures for placing the student at the appropriate level for beginning each assessment reduces student fatigue and maximizes students' opportunities to show their highest performance.

Some concerns were also identified through this review:

✓ The analysis of the technical quality of the assessments revealed that approximately one-third of the items were "flagged" for having statistical values outside the expected range, although most of the flags were for relatively minor statistical differences;

✓ However, approximately 15 items were flagged for Differential Item Functioning, a measure which suggests that an item's wording or content may confer an advantage to one subgroup of test-takers compared to another subgroup;

✓ The authors of the alignment study indicated that a draft teacher's guide to the alternate assessments provided for the alignment study was out of date and needed to be updated to address changes to the academic standards and the alternate assessments.

<u>Recommendations</u>

Overall, the SC-Alt ELA and Mathematics assessments are aligned with the South Carolina ELA and Mathematics academic standards and have acceptable technical quality consistent with the requirements of Section 59-18-320 A. Based on these findings, it is recommended that the SC-Alternate ELA and Mathematics assessments be approved with the following recommendations:

1. The South Carolina State Department of Education (SDE) should review the SC-Alt ELA and Mathematics items which were "flagged" for their statistical values, especially those items flagged for Differential Item Functioning, to identify reasons for the statistical aberrations observed and to identify the need to revise or eliminate the items from the assessments.

2. The SDE should develop and disseminate updated professional development guides and materials related to the Assessment Standards and Measurement Guidelines and the SC-Alt assessments, including information to assist teachers to align their instruction with the Assessment Standards and Measurement Guidelines.

Introduction

This report summarizes the results from studies of the South Carolina Alternate Assessment (SC-Alt) English Language Arts (ELA) and Mathematics field tests administered in Spring 2006 and the revised assessments administered in Spring 2007. The studies were conducted under the auspices of the Education Oversight Committee (EOC) as part of its responsibilities listed in the Education Accountability Act of 1998 (EAA):

> After the first statewide field test of the assessment program in each of the four academic areas, and after the field tests of the end of course assessments of benchmark courses, the Education Oversight Committee, established in Section 59-6-10, will review the state assessment program and the course assessments for alignment with the state standards, level of difficulty and validity, and for the ability to differentiate levels of achievement, and will make recommendations for needed changes, if any. The review will be provided to the State Board of Education, the State Department of Education, the Governor, the Senate Education Committee, and the House Education and Public Works Committee as soon as feasible after the field tests. The Department of Education will then report to the Education Oversight Committee no later than one month after receiving the reports on the changes made to the assessments to comply with the recommendations. (Section 59-18-320 A)

The report describes the SC-Alt ELA and Mathematics assessments, describes the studies conducted for this review, presents the findings from the studies, and makes recommendations regarding the assessments.

Development of SC-Alt ELA and Mathematics Assessments

The SC-Alt ELA and Mathematics assessments are intended for administration to students with significant cognitive disabilities. These students, who are functioning below grade level expectations, have levels of disabilities such that they cannot participate in the regular administrations of the Palmetto Achievement Challenge Tests (PACT) or the High School Assessment Program (HSAP) assessments, even with accommodations or modifications. Federal No Child Left Behind (NCLB) and Individuals With Disabilities Education Act (IDEA) legislation require that all students be tested and require that states provided an alternate assessment for students with significant cognitive disabilities.

The SC-Alt is intended to replace current PACT-Alternate assessments (for grades 3 through 8) and HSAP-Alternate assessment (for grade 10). The SC-Alt assessments are needed to replace PACT-Alt and HSAP-Alt because of changes and clarifications in NCLB regulatory guidance and the reauthorization of IDEA. These changes to federal legislation regarding students with significant cognitive disabilities require that instruction and assessment for these students be based on the grade level academic standards for the grade in which the student is enrolled, although they may be at less complex levels or may have an emphasis on prerequisite skills. NCLB guidance also allows for assessments to be linked to grade bands as these students do not typically make the same level of progress from year to year as students in the general assessment.

The current PACT-Alt and HSAP-Alt assessments are not based on grade level academic standards. In practice, this has meant that teachers have based instruction and assessment largely on the academic standards for grades Kindergarten through grade 2 regardless of the age levels of their students with significant cognitive disabilities. The federal changes have also led to changes in goals for Individualized Education Programs (IEPs) for students with disabilities from individual objectives to include objectives based on the state academic

standards as well as functional objectives. To meet federal requirements, the assessments for students with significant cognitive disabilities needed to be revised, and SC-Alt has resulted from those revisions.

Alternate assessments such as SC-Alt are based on state grade level academic standards, but at lower levels of complexity or with greater focus on introductory or prerequisite skills. In 2005 committees composed of ELA and mathematics content specialists, experts in the instruction of significantly cognitively disabled students, and staff from the South Carolina State Department of Education (SDE) and its testing contractor, the American Institutes for Research (AIR), reviewed the academic standards to identify the "standards they felt based on professional judgment were the most important to the population now and in the future" (Overview of the SC-Alt Technical Documentation Presented to the National Alternate Assessment Center, March 16, 2007, p. 6). Following their identification of the priority standards for students with significant cognitive disabilities, these committees developed Assessment Standards and Measurement Guidelines (ASMG) in each subject area to guide instruction and the construction of   SC-Alt   (the   ASMGs   are   available   at http://ed.sc.gov/agency/offices/assessment/programs/SWD/SC-AltAssessmentStandardsandMeasurementGuidelines.html). The SC-Alt ELA and Mathematics assessments are based on the corresponding ASMG, providing a link from the assessment to the state grade level academic standards.

Description of the SC-Alt ELA and Mathematics Assessments

The SC-Alt is individually administered to each student, generally by the teacher who has provided instruction to that student. In addition to the teacher administering the assessment, a trained monitor unrelated to the student must be present during the test administration. The monitor is required to ensure that the assessment is administered and scored properly. The assessment is administered during a 6-7 week window starting in March. The student may complete the assessment for each subject area in one session or, if the student tires or is non-attentive, the assessment may be administered over several days.

The SC-Alt ELA and Mathematics assessments are designed for administration to three age grade bands commensurate with the age ranges of students typically enrolled in those grades. An "elementary" form is intended for use with students aged 8-10 by September 1 of the school year of testing (corresponding to the grade band 3 through 5). The "middle school" form is administered to students aged 11-13, corresponding to grade band 6 through 8, and the "high school" form is administered to students aged 15 (the age when most students are classified as 10th graders). The SC-Alt is designed to provide a continuous scale of increasing difficulty for students aged 8 through 13 and age 15, with the content of the test appropriate for students aged 8 through 15. This design is intended to provide appropriate age-related content to maintain interest and motivation on the part of the student being tested.

Each grade-band form consists of 12 performance tasks, with each task containing 4 to 8 items. The performance task format was chosen for the SC-Alt based on the advice of special education advisory committees, based in part on educators' acceptance of the current performance task format of the HSAP-Alt. The PACT-Alt was based on the collection and scoring of a portfolio of student work or behavior. The portfolio format was criticized by educators because of paperwork loads and concerns about the subjectivity of portfolios and their scoring.

The SC-Alt assessment is scripted, with specific directions to the teacher for administration and scoring of the assessment (see Figure 1 for descriptive information about the SC-Alt tasks and items).

Figure 1
SC-Alt Tasks and Items

A task is a set of four to eight related activities, called items. The responses to the items provide evidence of what students know and can do.

- ✓ Each task begins with an introductory statement that establishes the context for what the student will be doing. There is a clear progression within each task from one activity to another.
- ✓ The teacher uses scripted directions to pose specifically worded questions and prompts to the student.
- ✓ The student responds by using the mode of communication that he or she uses during instruction. These response modes include but are not limited to an oral response, pointing, use of eye gaze, a response card, sign language, or an augmentative communication device.
- ✓ The test administrator will use various materials to administer a task or an item to help a student respond. Some of the materials are provided with each task, and some materials that are readily available at the school are provided by the test administrator.
- ✓ The materials may include poster, charts, tables, schedules, and signs that the administrator reads aloud and manipulatives such as checkers, balls, and geometric shapes.
- ✓ Unless the task is presented entirely through the use of concrete objects, resources will also include a set of response cards for each item to facilitate a student's response.
- ✓ Each task addresses one or more of the assessment standards or measurement guidelines.
- ✓ The SC-Alt assesses selected standards or measurement guidelines. Individual students are assessed on a sample of standards and guidelines.

Scripted items:
- ✓ Each item begins with a scripted opening statement in Say/Do format. For example, "Say: Here is a …," or, "Say: Look at/touch the …"
- ✓ The opening statement is followed by a directive for the student to tell or show the teacher which one of several response options is correct. For example, "Say: Tell (show) me what the boy in the story did when he got home."

(Sources: Spring 2006 and Spring 2007 Test Administration Manuals.)

The tasks are ordered in difficulty, with the least complex task appropriate for the student administered first, and, as the student successfully answers the items in each successive task, the testing session is continued through the more complex tasks until the student fails to correctly answer or respond to a specified number of items. Prior to the administration of the SC-Alt for each content area, each student's ability in that content area is evaluated by the teacher using the Student Placement Questionnaire (SPQ) (Appendix 1) to determine the student's entry into the test form (e.g., the first task which will be administered to the student). The teacher's evaluation of the student on the SPQ instrument is based on the teacher's

experience during the year of instruction he or she has provided the student. Based on the teacher's evaluation of the student's ability using the SPQ, the student may start the test with the first task, or, if the student has higher levels of cognitive functioning, at task 3 or task 6, as appropriate. This adaptation of the test to the student's abilities is intended to increase the accuracy of the student's test score by only administering appropriately challenging items to the student. The use of the SPQ is also intended to avoid excessively tiring the student and to maintain the student's interest and motivation by avoiding items that are well below the student's ability level. If the teacher finds that the beginning task suggested by the SPQ is too challenging for the student, the teacher chooses a lower level task based on the criteria listed in the administration directions. Regardless of the student's entry point into the assessment, each student must complete at least 5 tasks, but may respond to more than 5 tasks if the student's performance meets the criteria for continuing.

The student's response to each question on the assessment is recorded and scored by the teacher administering the assessment. The test administrators and monitors must receive professional development on the administration and scoring of the assessment. The scoring of each item may be "scaffolded" if the student provides an incorrect answer or does not respond. For example, if an item has three answer options, only one of which is correct, and the student fails to choose the correct answer on the first try, on the student's second try the teacher may restate the question but provide only two responses, eliminating the incorrect answer chosen initially by the student. If the student again fails to choose the correct answer (or does not respond to the question), then the teacher records a "0" or "No Response" and moves on to the next item. If the student correctly responds when only two choices are given rather than three choices, the student is awarded fewer points than if he or she had correctly answered the item on the first try. This scaffolding of the scoring provides for a level of success for the student and allows the identification of the student's partial level of skill or knowledge in the standard assessed by the item.

Studies Conducted of SC-Alt ELA and Mathematics Assessments

The SC-Alt ELA and Mathematics assessments were initially field tested in Spring 2006. The tasks and items in the initial field test were selected for further use, revised, or eliminated following reviews by content area committees, reviews of data from the technical analyses of the task and item data, reviews of the results of the study of the task and item alignment with the academic standards, and reviews of comments from teachers who had administered the field tests. Following this review, three grade-band forms (grades 3-5, grades 6-8, and grade 10) for each content area were created using the revised tasks and items from the 2006 field test for administration in Spring 2007. The studies conducted for this review are based on data from the 2006 field test and from the 2007 administration of the revised tasks and items.

Studies of the alignment between the SC-Alt ELA and Mathematics assessments and the state academic standards were conducted by University of North Carolina-Charlotte and Western Carolina University professors of curriculum and special education, in cooperation with the SDE and the National Alternate Assessment Center (Flowers, Browder, Wakeman, & Karvonen, April 2006). The studies were part of a project to develop and pilot alignment procedures designed for evaluating tests for students with significant cognitive disabilities. The alignment studies were conducted in Spring 2006.

A technical review of the task and item data from the 2007 test administration was conducted by a professor of educational research and assessment at the University of South Carolina. In addition, EOC staff reviewed and analyzed information and documentation provided by the SDE

about the SC-Alt ELA and Mathematics tests (the documentation provided is listed in Appendix 2).

Findings

<u>Numbers of Students Assessed and Numbers of Tasks and Items Administered</u>

The numbers and the disability classifications of students participating in the 2006 field test and in the 2007 administration of SC-Alt ELA and Mathematics assessments are listed in Table 1. The eligibility of students to participate in the SC-Alt assessments is based upon meeting the criteria listed in Appendix 3. Students eligible to participate in the SC-Alt assessments have significant cognitive disabilities and represent approximately 0.5% of all students enrolled in grades 3 through 8 and grade 10, and approximately 4% of all special education students.

Table 1
Numbers of Students Tested and Their Disabilities, 2006 Field Test and 2007 Administration of SC-Alt ELA and Mathematics Assessments

Disability Classification	Number Students Participating in 2006 Field Test (%)	Number Students Participating in 2007 Administration (%)
Trainable Mentally Disabled (TMD)	973 (51.2)	992 (40.1)
Autism	277 (14.6)	406 (16.4)
Profound Mentally Disabled (PMD)	265 (13.9)	273 (11.0)
Educable Mentally Disabled (EMD)	194 (10.2)	546 (22.1)
Other*	191 (10.0)	259 (10.5)
Totals	1,900 (100)	2,476 (100)

Note: Totals may not equal 100% due to rounding.
* Includes categories: Multiple Disability; Other Health Impaired; Traumatic Brain Injury; Hearing, Visual, Speech, or Language Disabled; Orthopedically Impaired; Learning Disability; Unknown.

Many of the tasks and items administered in the Spring 2006 field test were revised or eliminated based on the academic standard alignment studies and the review of the technical characteristics of the items, so the data from the Spring 2007 administration of the SC-Alt ELA and Mathematics assessments were used for the technical analysis of the assessment items in this review. The numbers of tasks and items administered in Spring 2007 and reviewed in this report are listed in Table 2.

Table 2
Numbers of Tasks and Items By Grade Band Form
SC-Alt ELA and Mathematics 2007 Administration

Content Area	Grade Band 3-5 Form		Grade Band 6-8 Form		Grade 10 Form		Total No. Tasks	Total No. Items
	No. of Tasks	No. of Items	No. of Tasks	No. of Items	No. of Tasks	No. of Items		
ELA	12	68	12	65	12	64	36	197
Mathematics	12	53	12	55	12	60	36	168

<u>Study of the Alignment of the SC-Alt Items to the State Academic Standards</u>

During the spring of 2006 the SC-Alt ELA and Mathematics field test tasks and items were reviewed by a group of experts at the University of North Carolina-Charlotte and at Western Carolina University in partnership with the National Alternate Assessment Center (Fowler, et al., 2006). The Executive Summary from the alignment study report is provided in Appendix 4. The purpose of the review was to evaluate the alignment of the assessment items with the state academic standards using a pilot set of criteria for evaluating the alignment of assessments intended for use with students with significant cognitive disabilities. The review results were also used by the SDE and its contractor, the American Institute for Research (AIR) in the evaluation of the field test items for future use on the operational forms of SC-Alt.

Seven alignment criteria were developed by a team of content experts, special educators, and measurement experts. The alignment criteria were similar to other criteria for evaluating the alignment of test items to academic standards, but included three additional criteria (criteria 5-7) designed to apply to assessments intended for students with significant cognitive disabilities. The alignment criteria used in the study are listed in Table 3.

Table 3
Criteria for Judging the Alignment of Assessment Items and Academic Standards

1. The content is academic and includes the major domains/ strands of the content area as reflected in state and national standards (e.g., reading, math, science.)

2. The content is referenced to the student's assigned grade level (based on chronological age).

3. The achievement expectation is linked to the grade level content, but differs in depth or complexity; it is not grade level achievement. It may focus on prerequisite skills or those learned at earlier grades, but with applications to the grade level content. When applied to state level alternate assessments, these priorities are accessible to IEP planning teams.

4. There is some differentiation in achievement across grade levels or grade bands.

5. The focus of achievement promotes access to the activities, materials, and settings typical of the grade level but with the accommodations, adaptations, and supports needed for individualization.

6. The focus of achievement maintains fidelity with the content of the original grade level standards (content centrality) and when possible, the specified performance (category of knowledge).

7. Multiple levels of access to the general curriculum are planned so that students with different levels of symbolic communication can demonstrate learning. (Fowler, et al., 2006, p. 11)

Using these seven criteria, a team composed of three English language arts experts, two mathematics experts, two experts in the education of students with significant cognitive disabilities, and two experts in educational measurement evaluated the 44 ELA tasks consisting of 248 items and the 44 mathematics tasks containing 216 items used in the Spring 2006 SC-Alt field test. These tasks and items provided the basis for the creation of 2007 forms for grade bands 3 through 5, 6 through 8, and grade 10. The evaluators also administered a Curriculum

Indicators Survey to a small sample of South Carolina teachers of significantly disabled students to assess classroom instruction.

Following training in the seven alignment criteria, the evaluators achieved approximately 80% exact inter-rater agreement for the ELA items and greater than 80% agreement for the mathematics items, suggesting that the criteria were clear and that the alignment evaluations provided through the process were reliable.

With regard to criteria 1 and 2, all but 16 of the ELA items were found to be assessing academic skills; these 16 items were eliminated from further consideration, leaving 232 ELA items in the study. All of the mathematics items were found to be academic. Twelve of the 16 ELA items judged to be non-academic were deleted from the item pool and not used for the creation of operational forms of the tests. Most of the remaining items judged non-academic were the first items administered at the beginning of the least complex tasks and served either to introduce the topic of the task or to identify the student's engagement in the assessment activity. These "engagement" items were scored by the teacher using a scoring rubric having values from "Student demonstrates sustained involvement in the activity…" (indicating the maximum level of engagement) to "Student does not demonstrate any awareness of the object(s) or involvement in the activity taking place or may refuse to engage in the activity at any level" (non-responsive, or the lowest level of engagement).

The ELA items were judged to be aligned to both the National Council of Teachers of English (NCTE) standards and the South Carolina ELA academic standards, with the exception of Research. None of the ELA items addressed the Research standard. In response to this finding, the SDE and its alternate assessment advisory committee provided the following rationale for the exclusion of Research from the SC-Alt ELA assessment:

> "Rationale for Omission of the Research Domain from the SC-Alt Assessment Standards and Measurement Guidelines (ASMGs)
>
> A committee of special educators and English language arts (ELA) content specialists reviewed the state academic grade level standards to determine those that were most appropriate for students with significant cognitive disabilities both now and in the future. This group was committed to ensuring that the SC-Alt addressed the depth and breadth of the academic standards and selected standards for inclusion in the Assessment Standards Measurement Guidelines document with this in mind.
>
> The committee determined that although the Communication Goal is not directly assessed in the general assessment, this area is critical for students who do not transfer skills readily and must be taught communication skills in a variety of ways and settings. Therefore, they recommended that the assessment include tasks from the Communication Goal. The committee examined the Research Goal and standards carefully and determined that although these are important for daily classroom instruction and assessment, they are difficult to assess in a performance task. The committee was comfortable with recommending that the assessment standards focus primarily on the Reading, Writing, and Communication goals for the ELA portion of the SC-Alternate Assessment." (SDE, March 2007)

Most of the ELA items assessed Reading (approximately 80%), followed by Writing (13%-20% depending on the grade band form) and Communication (3%-10% depending on the grade band).

All of the mathematics items addressed the grade band standards. The Number and Operations standard was most frequently assessed (31%-34% of the items depending on the grade band form), followed by Measurement (20%-29% of the items), Geometry (20%-21% of the items), Algebra (11%-14% of the items) and Data Analysis and Probability (9%-12% of the items).

With regard to alignment criterion 3, the evaluators found that the Assessment Standards and Measurement Guidelines and the test items for both ELA and Mathematics satisfied the criterion that the assessment be linked to grade level standards but at a lower level of complexity. However, the evaluators expressed some concern about the emphasis on Reading in the ELA items and the emphasis on Number and Operations among the mathematics items, along with the relatively low levels of cognitive demand presented by the items and the low levels of cognitive expectations for students during instruction which was reported by the teachers. The evaluators indicated that this issue should be discussed to determine the need for broadening the curriculum for the students. The evaluators also identified the need to provide professional development to teachers on how to increase the cognitive complexity of instructional activities.

The evaluators found that there is significant differentiation across the grade bands in the complexity of achievement measured by the ELA and mathematics items (criterion 4). With regard to criterion 5, the evaluators found that the ELA and mathematics tasks and items were appropriate for the target group of students and that the items, as intended, were appropriate for either younger or older students. The evaluators did note, however, that the existing professional development materials were based on standards and instructional strategies and materials from the Kindergarten to second grade standards. The evaluators recommended that revised professional development materials be developed to assist teachers to adapt grade level activities to their students' cognitive capacities and skill levels.

The ELA and mathematics tasks and items were found to be well aligned with the content and cognitive skills found in the grade level academic standards (criterion 6). The evaluators also recommended that professional development materials designed to help teachers identify the alignment of their instructional objectives and the state academic standards be created and disseminated.

Finally, with regard to criterion 7, that the tasks and items address the full range of student communication skills, the evaluators found that construction of the ELA and mathematics items was weighted heavily toward students who possess a higher level of communication skill (i.e., at the symbolic level). The evaluators identified four levels of communication skills among students with significant cognitive disabilities:

1. Awareness: student has no clear response and no objective in communication.
2. Pre-symbolic: student communicates with gestures, eye gaze, purposeful moving to object, sounds.
3. Early Symbolic: student begins to use pictures or other symbols (less than 10) to communicate within a limited vocabulary.
4. Symbolic: student speaks or has vocabulary of signs, pictures to communicate. Recognizes some sight words, numbers, etc. (Fowler, et al., 2006, p. 37)

The evaluators questioned whether the assessments could identify the proficiency of students communicating at lower levels than the symbolic level when the tasks and items were weighted so heavily toward symbolic communication.

Overall, the evaluators judged that the assessment system "links to the grade level content" (Fowler, et al., 2006, p. 7) and that the evidence from the assessments supports the judgment that the Assessment Standards and Measurement Guidelines and the ELA and mathematics tasks and items meet all seven alignment criteria. The evaluators recommended that the professional development materials provided by the SDE at the time of the evaluation study be revised to reflect the current focus of the Assessment Standards and Measurement Guidelines and the SC-Alt assessments.

Technical Analysis of Test Forms, Tasks, and Items

Dr. Christine DiStefano, a professor of educational research and measurement at the University of South Carolina, conducted a review of the technical characteristics of the SC-Alt ELA and Mathematics assessments. Dr. DiStefano's studies focused on the evidence provided from the technical data which informed the requirement in the Education Accountability Act (Section 59-18-320A) that the assessments be reviewed for their "level of difficulty and validity" and "the ability to differentiate levels of achievement." Her report is included in Appendix 5 of this report.

Dr. DiStefano stated that a strength of the SC-Alt was the use of multiple measures both to identify students for administration of the SC-Alt (the student participation guidelines) and to determine the starting point among the assessment tasks for individual students (the Student Placement Questionnaire). She also noted that the training provided for test administrators on placement of students on the test and scoring of their responses helped to ensure the validity of the test scores.

Dr. DiStefano found that the ELA and mathematics item statistics were within acceptable ranges for the intended use of the tests. As intended, the tests increased in difficulty across the grade bands, indicating that older students were assessed on more complex skills than younger students. Overall, the assessments were of moderate difficulty, with students answering approximately 60% of the items correctly. The item statistics indicated that the tests had acceptable levels of discrimination, indicating that both the ELA and mathematics assessments provided results which were useful to distinguish between high and low ability students.

The technical analysis revealed that approximately one-third of the test items were "flagged" for having technical statistics which exceeded the expected ranges. Most of the "flags" were considered to be for rather minor departures from the technical expectations, but at least 15 items showed Differential Item Functioning (DIF) statistics possibly indicating that some characteristics of the items enabled one demographic group to score higher on the items than another demographic group. Dr. DiStefano indicated that this potential "bias" of the item toward one group in favor of another should be investigated by reviewing the item statistics and the wording and content of the items to identify potential reasons for the DIF flag. All of the items chosen for the test forms were reviewed and approved by a "bias review committee," but the empirical DIF statistics suggest there may some unanticipated explanation for the differential performance of subgroups. Dr. DiStefano also pointed out that the item statistics may have been affected by the small sample sizes, especially with the grade 10 form; smaller sample sizes for calculating the statistics increase the size of the margins of error in estimating the true values of the statistics.

Finally, Dr. DiStefano recommended that the outcomes from the SC-Alt ELA and Mathematics assessments be reviewed when impact data are available to evaluate the overall difficulty of the operational assessments and the rigor of the performance standards. Based on the data

available at this time, however, she found that the SC-Alt appears to perform effectively to assess South Carolina's students with significant cognitive disabilities.

Conclusions and Recommendations

The studies conducted in this review identified a number of strengths of the SC-Alt ELA and Mathematics alternate assessments:

- ✓ The assessments provide accountability and information for instructional improvement for students with significant cognitive disabilities who would not otherwise be assessed in the state testing programs, even with test accommodations and modifications;
- ✓ With the exception of the ELA Research standard, the assessments are aligned with the same grade level academic standards as for all students, although at levels of complexity appropriate for the diversity of cognitive functioning observed among students with significant cognitive disabilities;
  - o The rationale for not assessing the ELA Research standard which was provided by the SDE and its advisory committee indicated that the Research standard was more appropriately assessed in the course of classroom instruction;
- ✓ The assessments address increasingly complex and more difficult skills across student age levels and have been designed to provide a vertical scale to measure growth;
- ✓ The items in the assessments have a wide range of difficulty and the tests are able to discriminate between high and low levels of performance;
- ✓ The assessments are individually administered by the students' teachers in the familiar context of the classroom;
- ✓ The assessment formats allow students to respond to the items using the communication modes the student uses during instruction, such as oral response, pointing, use of eye gaze, use of a response card, sign language, or an augmentative communication device;
- ✓ The assessments are scripted, their administration and scoring is observed by monitors, and the teachers and monitors administering the assessments undergo training to ensure that the assessment administration is standardized and the results are valid measures of the student's ability;
- ✓ The assessments are administered over a six- to seven-week period, providing flexibility and opportunities for maintaining student motivation and interest and reducing student fatigue;
- ✓ The procedures for placing the student at the appropriate level for beginning each assessment reduces student fatigue and maximizes students' opportunities to show their highest performance.

Some concerns were also identified through this review:

- ✓ The analysis of the technical quality of the assessments revealed that approximately one-third of the items were "flagged" for having statistical values outside the expected range, although most of the flags were for relatively minor statistical differences;
- ✓ However, approximately 15 items were flagged for Differential Item Functioning, a measure which suggests that an item's wording or content may confer an advantage to one subgroup of test-takers compared to another subgroup;
- ✓ The authors of the alignment study indicated that a draft teacher's guide to the alternate assessments provided for the alignment study was out of date and needed to be updated to address changes to the academic standards and the alternate assessments.

Recommendations

Overall, the SC-Alt ELA and Mathematics assessments are aligned with the South Carolina ELA and Mathematics academic standards and have acceptable technical quality consistent with the requirements of Section 59-18-320 A. Based on these findings, it is recommended that the SC-Alternate ELA and Mathematics assessments be approved with the following recommendations:

1. The South Carolina State Department of Education (SDE) should review the SC-Alt ELA and Mathematics items which were "flagged" for their statistical values, especially those items flagged for Differential Item Functioning, to identify reasons for the statistical aberrations observed and to identify the need to revise or eliminate the items from the assessments.
2. The SDE should develop and disseminate updated professional development guides and materials related to the Assessment Standards and Measurement Guidelines and the SC-Alt assessments, including information to assist teachers to align their instruction with the Assessment Standards and Measurement Guidelines.

APPENDIX 1

Example of Student Placement Questionnaire

SC-ALT STUDENT PLACEMENT QUESTIONNAIRE
ENGLISH LANGUAGE ARTS
(completed SPQ example)

Follow steps 1-4 to complete the SPQ and identify the starting task.

(1) Please darken the bubble (●) that corresponds to the most appropriate response for this student. Mark only one response for each item. Please mark a response for all items below. Use a no. 2 pencil only.

	No, she/he cannot do this	With physical prompting/hand-over-hand	With verbal/gestural prompting	Independently

In reading, can this student:

	Independently	With verbal/gestural prompting	With physical prompting/hand-over-hand	No, she/he cannot do this
1. Attend to text read aloud?	○	●	○	○
2. Recall details in text read aloud?	○	●	○	○
3. Recognize some high-frequency written words?	○	○	●	○
4. Draw conclusions or make inferences about texts?	○	○	○	●

In writing, can this student:

5. Write his or her name using a pencil, name stamp, letter tiles, or other means?	○	●	○	○
6. Use objects, pictures, and/or picture symbols to write in any format?	○	○	●	○
7. Copy, trace, or print letters?	○	●	○	○
8. Use oral language and/or letters and words to write?	○	○	○	●

In communicating, can this student:

9. Listen (i.e., demonstrate receptive behavior) and respond?	●	○	○	○
10. Participate in conversations by responding appropriately?	○	●	○	○
11. Use language to express a preference, opinion, or viewpoint?	○	●	○	○
12. Recognize and understand the meaning of environmental signs (e.g., street signs, store signs, school signs)?	○	●	○	○

(2) Write in the total number of bubbles you marked in each column | 1 | 7 | 2 |

col.1   col.2   col.3

(3) Calculate the SPQ total score
(a) write the column totals from (2) in (a) below
(b) multiply and write the results in (b) below
(c) sum the results from (b) and write the sum in (c)

	(a)		(b)
Column 1 Total	1	x 3 =	3
			+
Column 2 Total	7	x 2 =	14
			+
Column 3 Total	2	x 1 =	2

(c) Total SPQ Score = 19

(4) Identify the starting task for this student using the SPQ total score from step (3).

If the total score is in this range	Start at this task	Administer all items in at least these tasks
0-11	Task 1	1-5
12-22	Task 3	3-9
23-36	Task 6	6-12

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APPENDIX 2
SC-Alt Documentation Provided by
South Carolina Department of Education

1. American Institutes for Research. *Plan for Setting Status Based Performance Standards for SC-Alt* (April 2007)
2. American Institutes for Research. *SC-Alt ELA and Math Operational Assessments Proposed Grade Band Design for Operational Administration and Linking* (August 9, 2006)
3. American Institutes for Research. *South Carolina Alternate Assessment: Marginal Reliability Estimates & Standard Error of Measurement Across Grade Bands and Content Areas* (August 14, 2007)
4. American Institutes for Research. *Technical Report (Draft), SC-Alt Setting Standards in Grade Bands 3-5, 6-8 and 10, Spring 2007 Standard Setting* (June 2007)
5. *Assessment Standards and Measurement Guidelines, SC-Alt English Language Arts*, March 2006
6. *Assessment Standards and Measurement Guidelines, SC-Alt Mathematics,* March 2006
7. *Descriptions of Achievement Levels, ELA, Mathematics, Science, Social Studies* (no date)
8. *District Test Coordinator's Supplement, SC-Alt English Language Arts, Mathematics,* Spring 2007
9. Flowers, C., Browder, D., Wakeman, S, & Karvonen, M. (April 2006). *Alternate Assessment Alignment Pilot Study Report to the South Carolina State Department of Education.* University of North Carolina at Charlotte
10. *Information and Procedures for the SC-Alt Field Test Item Data Review Meeting* (May 19, 2006)
11. *Notes from Alignment Study RE: ELA Tests* (no date)
12. *Overview of SC-Alt Technical Documentation Presented to the National Alternate Assessment Center* (March 16, 2007)
13. *Rationale for Omission of the Research Domain from the SC-Alt Assessment Standards and Measurement Guidelines* (no date)
14. *South Carolina Alternate Assessment 2006 Field Test Brief for the August Meeting of the South Carolina Department of Education Technical Advisory Committee* (August 7, 2006)
15. *Summary of the Data Review Comments, Outcomes from the Item Analysis, Teacher Comments, and Alignment Study* (no date)
16. *Summary Tables for SC-Alt Technical Advisory Committee, South Carolina Alternate Assessment, 2007 Administration* (July 2007)
17. *Synopsis for State Board of Education (Draft)* (September 12, 2007)
18. *Test Administration Manual, SC-Alt Field Test, Spring 2006*
19. *Test Administration Manual, SC-Alt English Language Arts, Mathematics, Spring 2007*
20. *The South Carolina Alternate Assessment Spring 2007 Directions for Determining the Starting and Concluding Tasks* (no date)

APPENDIX 3
Participation Guidelines for Alternate Assessment

The decision about a student's participation in assessment is made by the student's IEP team and documented in the IEP. To document that alternate assessment is appropriate for an individual student, the IEP team should review all important information about the student over multiple school years and multiple instructional settings (e.g., school, home, community) and determine that the student meets **all** of the following criteria:

- The student demonstrates a significant cognitive disability and adaptive skills, which result in performance that is substantially below grade-level achievement expectations even with the use of accommodations and modifications;

- The student accesses the state approved curriculum standards at less complex levels and with extensively modified instruction;

- The student has current adaptive skills requiring extensive direct instruction and practice in multiple settings to accomplish the application and transfer of skills necessary for application in school, work, home, and community environments;

- The student is unable to apply or use academic skills across natural settings when instructed solely or primarily through classroom instruction; and

- The student's inability to achieve the state grade level achievement expectations is not the result of excessive or extended absences or social, cultural, or economic differences.

Applicable Grades/Ages for Alternate Assessment Programs

South Carolina Readiness Assessment-Alternate Scoring (SCRA-Alt.)
The SCRA-Alternate Scoring should be used with students who meet all of the participation criteria for alternate assessment and whose age is commensurate with students in kindergarten and first grade (students who are 5 and 6 on September 1, 2006).

South Carolina Alternate Assessment (SC-Alt)
The SC-Alt should be administered to students who have been determined by the IEP team to meet all of the participation criteria for alternate assessment and who are age 8-13 or 15 on September 1, 2006.

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APPENDIX 4
Alternate Assessment Alignment Pilot Study
Report to the South Carolina State Department of Education

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April 2006

EXECUTIVE SUMMARY

This report details findings from an investigation of the alignment of South Carolina's alternate assessments in English language arts (ELA) and mathematics with other components of the educational system. The criteria used in this alignment study are being evaluated as part of the UNC Charlotte partnership in the *National Alternate Assessment Center* (NAAC). This report is organized by the seven criteria developed by a collaboration of content experts, special educators, and measurement experts at UNC Charlotte (Browder, Wakeman, Flowers, Rickleman, Pugalee, & Karvonen, 2006). While some of the alignment criteria are similar to other alignment methods (e.g., Webb, Surveys of Enacted Curriculum, and Achieve), some of the criteria (criteria 5-7) were designed specifically as value indicators for students with significant cognitive disabilities (see Table 1). An additional difference between this alignment protocol and other alignment methods is the examination of the targeted standards (i.e., standards intentionally selected for students with significant cognitive disabilities) and grade-level content standards. This summary describes how well the interpretation of state standards (Grade level and Measurement Guidelines), the alternate assessments (ELA-AA; Math-AA), and instruction (professional development manual and teacher survey about instruction) met the seven criteria for alignment.

Alignment Results by Criterion

<u>Criterion 1</u>: *The content is academic and includes the major domains/ strands of the content area as reflected in state and national standards (e.g., reading, math, science).*

> <u>Outcome:</u> The measurement guidelines were academic and reflected the major strands of reading and mathematics content (science was not reviewed) except for the omission of a focus on research skills in ELA. The alternate assessment also reflected the major strands of this content with a corresponding omission of research content. A few alternate assessment items were rated as nonacademic by the content experts because they did not fit any of the strands of ELA or mathematics content. These items were deleted from further alignment analysis. The professional development manual and teacher survey revealed a focus on the major strands of ELA and mathematics in instruction. Overall, this state system is aligned to academic content and meets criterion 1. We recommend either including content on Research in the measurement guidelines, alternate assessment, and professional development materials, or providing a rationale for why this ELA content strand is not considered relevant for this population.

<u>Criterion 2</u>: *The content is referenced to the student's assigned grade level (based on chronological age).*

> <u>Outcome:</u> For this second criterion, the focus was on alignment with the specific South Carolina curriculum standards for the content by grade bands in ELA and math. The measurement guidelines and alternate assessment items were aligned with the content

standards for the grade band. All categories of standards were represented except for the state standard on Research. The professional development manual reviewed was developed for an earlier era of alternate assessment and only contains information on linking to PK-2 standards. Overall, this state system is focused on grade level content standards in the measurement guidelines and alternate assessment. We recommend organizing professional development materials by grade bands.

Criterion 3: *The achievement expectation is linked to the grade level content, but differs in depth or complexity; it is not grade level achievement. It may focus on prerequisite skills or those learned at earlier grades, but with applications to the grade level content. When applied to state level alternate assessments, these priorities are accessible to IEP planning teams.*

Outcome: As would be expected for an alternate assessment based on alternate achievement standards, the measurement guidelines reflect levels of cognitive demand that are less complex than grade level achievement. The alternate assessment matches the depth of knowledge targeted by these measurement guidelines. For ELA measurement guidelines and alternate assessment, most items focused on reading. Math had a heavy emphasis on numbers and operations. At least 50% of the content standards under each academic domain had at least one MG or AA item except for the Research strand resulting in a 75% range-of-knowledge. Based on the teacher survey of instruction, in ELA, the majority of instructional emphasis was on reading, followed by communication and in math it was numbers and operations. In general, teachers identified a greater emphasis on the lower levels of cognitive demand as the highest performance expectation for the target student in 2005-06. Overall, this state has developed a system that targets achievement that is an alternative to grade level achievement. However, the balance across strands of content is weighted to one specific strand for both ELA and mathematics while reflecting some content in other strands. Currently, teachers report instruction that reflects similar emphasis by content area but with even lower levels of cognitive demand. Since the measurement guidelines and alternate assessments match in emphasis, these do align. We recommend some discussion about whether future work should focus on a wider range of knowledge for this population or maintain the current balance. We also recommend that professional development materials include ideas for teachers to increase the cognitive complexity reflected in instructional goals.

Criterion 4: *There is some differentiation in achievement across grade levels or grade bands.*

Outcome: This state uses the same alternate assessment across grade levels to show growth across grades. Our analysis revealed that there is a significant difference in the complexity of easier versus more difficult items in this assessment. The professional development materials do not yet indicate how to target increasing competence for a standard across grade levels/ grade bands.

Criterion 5: *The focus of achievement promotes access to the activities, materials, and settings typical of the grade level but with the accommodations, adaptations, and supports needed for individualization.*

Outcome: Because the state developed a single alternate assessment for use across grade levels, the goal was to utilize tasks that were applicable to all grades/ ages. Our analysis revealed that this goal was achieved as nearly all items were appropriate for either elementary or older students. In contrast, teachers reported that they adapted instructional materials primarily from grades K-2, even with students assigned to higher

grades. We recommend that the professional development materials contain information on how to adapt a grade level activity to students' current skill levels. The materials do include information on teaching in inclusive settings.

Criterion 6: *The focus of achievement maintains fidelity with the content of the original grade level standards (content centrality) and when possible, the specified performance (category of knowledge).*

> Outcome: Overall content and performance centrality of the alternate assessment items to the measurement guidelines suggested a good quality of alignment. We recommend that professional development include guidelines for teachers on how to determine if an objective aligns to a state standard (e.g., see www.naacpartners.org resources for teachers on this topic.)

Criterion 7: *Multiple levels of access to the general curriculum are planned so that students with different levels of symbolic communication can demonstrate learning.*

> Outcome: The alternate assessments contain items at all symbolic levels reflecting its accessibility for a wide range of students within this population. However, it is weighted heavily with items at the symbolic level. The professional development materials also contain examples at all symbolic levels although this specific terminology is not used. We recommend some state discussion of whether students below the symbolic level will/should be able to achieve proficiency on this alternate assessment with the number of items provided.

Overall Analysis of Alignment

This state has evidence supporting alignment for its measurement guidelines and alternate assessment based on all seven criteria. We conclude that overall this is an alternate assessment system that links to the grade level content. Some areas for consideration in further development of the system are noted above related to balance of content. We understood from the onset that the professional development materials reviewed have not been revised to reflect the current focus of the alternate assessment system. This was verified in our analysis as the materials currently support criteria 1, 2, and 7 but need additional material to address the remaining criteria. The information on instruction obtained from teachers was limited in both respondents and number of criteria addressed by the survey. However, it did suggest that the content of instruction roughly matched the alternate assessments while the cognitive complexity and grade level of adapted materials were not as well aligned.

APPENDIX 5

**Technical Evaluation of Test Data From 2007 Administration:
SC-Alt English Language Arts and Mathematics**

South Carolina Alternate Assessment

Technical Evaluation of Test Data From Spring 2007 Administration:

SC-Alt English Language Arts and Math

A Report to the Educational Oversight Committee

Christine DiStefano
University of South Carolina
September 2007

South Carolina Alternate Assessment
Technical Evaluation of Test Data From Spring 2007 Administration:
English Language Arts and Math

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Description of the South Carolina Alternate Assessment Program

As part of South Carolina's state Accountability Program, students attending public schools take yearly standardized assessments to gauge student progress and relay information about school performance. Every student in the public schools is required to participate in the state testing program. This mandate also extends to students with cognitive disabilities. As stated on the SC Department of Education website (www.ed.sc.gov):

> "All students with disabilities must be included in statewide or district-wide assessments and if necessary, must have accommodations or modifications, or must participate in an alternate assessment."

An alternate assessment program has been developed to meet the needs of students with significant cognitive disabilities who are unable to participate in the general Palmetto Achievement Challenge Tests (PACT) or High School Assessment Program (HSAP) testing programs, even with accommodations and/or modifications. The SC assessment program for these students is the South Carolina Alternate Assessment (SC-Alt). The SC-Alt is an assessment for students with significant cognitive disabilities; these students are assessed against alternate achievement standards.

This report summarizes technical information from test data of the South Carolina Alternate Assessment (SC-Alt) in the areas of English Language Arts (ELA) and mathematics. Data for this report were collected as part of the 2007 operational administration of the SC-Alt. The Education Oversight Committee (EOC) supported the current study as part of its responsibilities listed in the Education Accountability Act of 1988:

> Section 59-18-320. (A) After the first statewide field test of the assessment program in each of the four academic areas, and after the field tests of the end of course assessments of benchmark courses, the Education Oversight Committee established in Section 59-6-10, will review the state assessment program and the course assessments for alignment with the state standards, level of difficulty and validity, and for the ability to differentiate levels of achievement, and will make recommendations for the needed changes, if any. The review will be provided to the State Board of Education, the State Department of Education, the Governor, the Senate Education Committee, and the House Education and Public Works Committee as soon as feasible after the field tests. The Department of Education will then report to the Education Oversight Committee no later than one month after receiving the reports on the changes made to the assessments to comply with the recommendations.

SC-Alt Population

The SC-Alt serves students with significant cognitive disabilities. Thus, students must meet eligibility criteria to be allowed to participate in the SC-Alt instead of the regular PACT or HSAP testing programs. To determine if a student is eligible for the SC-Alt, multiple sources of data are evaluated where the data are collected over a period of several years. Input from multiple sources and multiple time periods ensures that students who require additional assistance are eligible to take the SC-Alt.

The participation guidelines stated below are taken directly from the State Department of Education (SDE) website (www.ed.sc.gov):

The decision about a student's participation in assessment is made by the student's Individual Education Plan (IEP) team and documented in the IEP. To document that alternate assessment is appropriate for an individual student, the IEP team should review all important information about the student over multiple school years and multiple instructional settings (e.g., school, home, community) and determine that the student meets **all** of the following criteria:

- The student demonstrates a significant cognitive disability and adaptive skills, which result in performance that is substantially below grade-level achievement expectations even with the use of accommodations and modifications;

- The student accesses the state approved curriculum standards at less complex levels and with extensively modified instruction;

- The student has current adaptive skills requiring extensive direct instruction and practice in multiple settings to accomplish the application and transfer of skills necessary for application in school, work, home, and community environments;

- The student is unable to apply or use academic skills across natural settings when instructed solely or primarily through classroom instruction; and

- The student's inability to achieve the state grade level achievement expectations is not the result of excessive or extended absences or social, cultural, or economic differences.

Instead of following grade level requirements for testing, the SC-Alt is administered to students who have been determined by the IEP team to meet all of the participation criteria for alternate assessment and who are between the ages of 8-13 or are 15 years old as of September 1 of the current assessment year. The SC-Alt is organized into three test booklets based on grade level bands. The three forms are defined as:

- Elementary school form: covering grades 3 through 5 and appropriate for students between the ages of 8 - 10 as of September 1 of the current assessment year
- Middle school form: covering grades 6 through 8 and appropriate for students between the ages of 11 - 13 as of September 1 of the current assessment year
- High school form: covering grade 10 and appropriate for students 15 years of age as of September 1 of the current assessment year

The age bands were constructed for SC-Alt testing in lieu of following the students' stated grade level because students with significant cognitive disabilities may not make academic progress in the same manner as mainstream students.

SC-Alt: Test Development
Alignment of Test Content to Curriculum Standards

SC-Alt has been designed to meet all federal and state regulations concerning the test content. The content domains of the SC-Alt tests are aligned with alternative curriculum standards approved by the South Carolina State Board of Education. Alternative achievement standards are aligned with South Carolina achievement standards for mainstream students; however, the alternative achievement standards differ in the expectations of student performance as that they differ in complexity level. Curriculum standards for content areas covered by the SC-Alt are available on the SDE website (http://ed.sc.gov/agency/offices/assessment/programs/swd/SC-Alt AssessmentStandardsandMeasurementGuidelines.html). The SC-Alt Assessment Standards and Measurement Guidelines were developed in compliance with the Individuals with Disabilities Education Act (IDEA) and the No Child Left Behind Act (NCLB) requirements that the alternate assessment must link to the grade-level content standards, although at less complex and prerequisite skill levels. More information about the link between the alternate curriculum standards and the SC-Alt test content is provided in the alignment study.

Test Design

SC-Alt replaces the previous alternate assessments, the PACT-Alt and the HSAP-Alt. The structure of the SC-Alt consists of a series of performance tasks in which students are required to demonstrate their understanding of the content. The SC-Alt tasks were developed by the testing contractor, American Institutes for Research (AIR), utilizing collaborative teams of experienced assessment writers with expertise in both the content areas and the learning characteristics of students with significant cognitive disabilities. The SC-Alt Assessment Standards and Measurement Guidelines provided the assessment teams with the ability to translate the standards into assessment tasks. The Content, Bias, and Accessibility Review Committee reviewed tasks prior to inclusion in the SC-Alt. The tasks were revised using input from small scale tryouts, focus groups discussions, and piloting and field testing to create the operational forms of the SC-Alt.

Each SC-Alt test form consists of twelve tasks. A task is a set of four to eight related activities or items and responses to the items provide evidence of what students know and can do in a given content area. Each test should have a sufficient number of items to provide a clear picture of student ability (Crocker & Algina, 1986) without overwhelming or fatiguing students.

While 12 tasks are included on each SC-Alt test form, the total number of items included on a test varies across the three grade band forms. For the operational forms of the 2007 spring administration of the SC-Alt, the numbers of items per form are provided below. Each form has a sufficient number of items included on each form to provide evidence of students' ability in a given content area.

Table 1. Number of Items on the South Carolina Alternate Assessment, ELA and Mathematics

Form	ELA	Mathematics
Elementary (Grades 3-5)	68	53
Middle School (Grades 6 – 8)	65	55
High School (Grade 10)	64	60
Total	197	168

Description of Testing Procedures

Given that a student meets the eligibility criteria for the SC-Alt and the correct grade level band is identified, teachers serve as test administrators for the SC-Alt. The test administrator administers the Student Placement Questionnaire (SPQ) to identify an appropriate starting position. The SPQ evaluates a student's ability and is used to determine an appropriate starting point within the test. This is done to avoid students being administered items that are too hard or too easy. Also, the process allows for an accurate assessment of the students' ability without overly fatiguing the student by exposure to unnecessary numbers of test items. Student fatigue is a concern given the dynamics of the SC-Alt population of students. Within a form, students are judged to have high, medium, or lower ability within the test band and the appropriate starting task is determined. Thus, students within the same grade level band may have different starting points within the same form, depending on the student's ability level. Given that students may have different starting points within the same instrument, students may, therefore, complete a different number of tasks. Additional detail about the SPQ and student placement is provided in the Test Administrators' Manual, which is available on the SC Department of Education website

(http://ed.sc.gov/agency/offices/assessment/programs/SWD/SouthCarolinaAlternateAssessmentSC-Alt.html).

SC-Alt test administrators undergo training to be familiar with the SPQ and how to interview students. Standardized training ensures that the teachers can gauge accurately an appropriate starting point. Additionally, the standardized training for all test administrators helps to ensure that the starting point judgments are fair and unbiased.

Each item on the SC-Alt has a point worth which may vary from one point to four points, depending on the complexity of the task to be performed. The test administrator scores the SC-Alt assessment as it is administered. To ensure scoring fidelity and scoring standardization across the state, training is required for all teachers who will administer the SC-Alt assessment. Standardized training for every test administrator helps to ensure appropriately administered and scored assessments. Proper test administration and scoring supports the validity of the SC-Alt results used for Adequate Yearly Progress (AYP) ratings and school report card ratings.

Sample Size

The SC-Alt is a specialized instrument, where students must meet pre-specified conditions to be eligible to take this test. The estimated number of students taking the SC-Alt is approximately 0.05% of the student population in SC schools (SC-Alt Technical Manual, March 16, 2007). The SC-Alt Technical Manual states that students with three primary disability designations

accounted for approximately 80% of the participants: trainable mentally disabled students (51.2%), autistic students (14.6%), and profoundly mentally disabled students (14.0%).

The number of students tested in the spring 2007 administration of the SC-Alt assessment was reported in the July, 2007 Summary Tables provided to the SC-Alt Technical Committee (AIR Technical Team, July 2007). Student sample sizes for the spring 2007 administration of the SC-Alt are provided in Table 2. Test data from these operational samples was used to compute the item statistics evaluated in the current report. The number of students involved with the spring 2007 SC-Alt administration is acceptable for students in the Elementary and Middle School grade level bands. It is recognized that the sample size for the High School grade band is lower than desired; however, this sample size represents disabled students within the grade band who were eligible to take the SC-Alt.

Table 2. Number of Students Tested, 2007 South Carolina Alternate Assessment ELA and Mathematics Assessment

Form	ELA	Mathematics
Elementary (Grades 3-5)	1076	1065
Middle School (Grades 6 – 8)	989	982
High School (Grade 10)	335	339

Data Analysis Procedures

SC-Alt item statistics were calculated by the SDE/AIR and delivered to the EOC for evaluation. EOC staff provided the SDE data sets to this author. Data sets contained statistical information for the SC-Alt ELA and Mathematics Fall 2007 operational administrations. Item statistics were calculated using Classical Test Theory (CTT) techniques and Item Response Theory (IRT) techniques where the Rasch model (i.e., one parameter item response theory model) was used. For the technical report, summaries of item statistics (difficulty, average point biserial values) and psychometric characteristics (e.g., Differential Item Functioning, Rasch ability estimates) were summarized for SC-Alt ELA and mathematics operational forms. It is noted that this technical report consists of evaluation and interpretation of the dataset indices provided to the EOC. Besides calculation of summary statistics (e.g., mean values, standard deviations), no additional estimation procedures (e.g., equating, ability estimates) were conducted. This report is arranged into three sections: a) summary of classical test theory indices, b) summary of item response theory indices, and c) investigation of impact.

Section A: Summary of Classical Test Theory Indices

Two Classical Test Theory (CTT) indices were included on the dataset: item difficulty and adjusted point-biserial. The item difficulty (p) may be defined as the proportion of students out of the total number of examinees answering an item correctly. Higher p values indicate easier items (i.e., a greater number of students selected the correct answer) and low p-values indicate more difficult items. Items which are too difficult or, conversely, too easy, do not differentiate between low performing and high performing students. A difficulty value of p = .5 provides the highest level of differentiation between students (Crocker & Algina, 1986).

The adjusted point biserial *r* is a measure of association indicating how well an item discriminates between high performing and low performing students. The value is calculated as the correlation between item scores (correct/incorrect) and the total score, with the item in question removed from the total score. The normal range of point biserial scores for items is –1 to +1, with higher values indicating that the item discriminates well between high and low performing students (Crocker & Algina, 1986). Values of the point biserial may be positive, meaning that the item is discriminating appropriately, or negative, indicating that the item is not discriminating as intended. Values that are close to zero or negative may indicate a flawed item. A value of zero means that there is no discrimination between high and low ability test takers; negative values indicate the tendency for high ability students to answer incorrectly and low ability students to answer correctly. A high point-biserial coefficient means that students selecting the correct response are students with higher total scores, and students selecting incorrect responses to an item have lower total scores, meaning the item can discriminate between low-performing examinees and high-performing examinees.

CTT Difficulty

Table 3 provides summary statistics for the difficulty values by SC-Alt Test form and age band and content area. Mean values across the ELA forms were at least p= .63, meaning that, on average, students answered 63% of the SC-Alt ELA items correctly. Minimum and maximum p-values showed a range of item difficulty values, ranging from a minimum value of p = .247 (illustrating a difficult item) to p=. 875 (illustrating a relatively easy item).

Item difficulty values were reviewed to determine the number of ELA items per form that were challenging for students, where p < .50. On the Elementary Form, 11 of the ELA 68 items (16%) had a p-value less than or equal to .50, 13 of 65 items (20%) on the Middle School form were challenging for students, and 15 of 64 items (23%) on the High School form were challenging. Thus, the majority of the SC-Alt ELA items were relatively easy for the population of students.

Mean values across the SC-Alt mathematics forms were at least p= .62, meaning that, on average, students answered at least 62% of the math items correctly. Minimum and maximum p-values in mathematics reported item difficulty values, ranging from p = .333 (relatively difficult for students) to p=. 875 (relatively easy items). Again, item difficulty values were reviewed to determine the number of items per form that were challenging for students, where p < .50. On the Elementary Form, 9 of the 53 items (17%) had a p-value less than or equal to .50, there were 13 of 55 items (24%) on the Middle School form with p-values less than .50, and 13 of 60 items (22%) on the High School form.

For the SC-Alt tests in ELA and mathematics, the information showed that the tests became slightly harder for students as the age band increased from Elementary to High School. This is not unusual, given that the content also increases in difficulty. Overall, for SC-Alt ELA and Mathematics content, difficulty values are slightly easier than expected (with p=.50 set as the midpoint for difficulty) Difficulty values are within an acceptable range, especially given the nature of the population, the use of the SPQ to pinpoint the appropriate student starting point, and the purpose of the SC-Alt instrument.

Table 3. CTT Difficulty Values, by Form

Form and Age Band	Number of Items	Mean Difficulty	Standard Deviation	Minimum Difficulty	Maximum Difficulty
ELA					
Elementary	68	.658	.142	.367	.859
Middle	65	.660	.154	.356	.875
High School	64	.633	.162	.247	.844
Mathematics					
Elementary	53	.631	.140	.367	.875
Middle	55	.629	.146	.333	.836
High School	60	.615	.123	.346	.817

CTT Discrimination

Table 4 provides summary statistics for the adjusted point biserial values for the SC-Alt ELA and Mathematics tests. Mean values across the SC-Alt ELA forms was at least $r_{pb} = 0.41$, illustrating that the set of tests are moderately discriminating. The average value means that, generally, SC-Alt students with lower total test scores chose incorrect responses and higher ability students chose correct responses. However, the r_{pb} is lower than .5, showing some inconsistencies. As seen by the mean point biserial value by form, the SC-Alt forms were roughly equivalent in their ability to discriminate between higher and lower ability students; no one form discriminated significantly better (worse) than the other SC-Alt ELA forms.

Item point biserial values were reviewed to determine the number of items per form that were able to discriminate between students of high and low ability students, where r_{pb} was greater than or equal to .50. ELA SC-Alt items were discriminating between students of different ability levels. On the Elementary Form, 18 of the 68 items (27%) had a adjusted point biserial values greater than or equal to .50, 27 of 65 (42%) of Middle School items reported r_{pb} greater than or equal to .50, and 28 of 64 items (44%) on the High School form were above .50. These values show that the tests are increasingly discriminating as the grade level band increases

A similar pattern was seen for the SC-Alt Math forms, where the mean point biserial value was at least .40, indicating a moderate level of discrimination. Item point biserial values were reviewed to determine the number of items per form that were able to discriminate between students of high and low ability students above the midpoint value ($r_{pb} > .50$). On the Elementary Form, 17 of the 53 items (32%) had adjusted point biserial values less than or equal to .50 and 20 of 60 items (33%) on the High School form – meaning that roughly a third of the items on

these forms were very good for discriminating between higher and lower ability students. The SC-Alt mathematics middle school form was more difficult for students with 29 of 55 items (53%) on the form yielding point biserial-values greater than .50.

Over both the SC-Alt ELA and Mathematics forms, the items are able to differentiate between students of higher and lower ability. The items are performing adequately to judge student knowledge. The discrimination information is thought to be appropriate given the requirements of the SC-Alt.

Table 4. Adjusted Point Biserial Values, by Form

Form and Age Band	Number of Items	Mean r_{pb}	Standard Deviation	Minimum r_{pb}	Maximum r_{pb}
ELA					
Elementary	68	.414	.157	.162	.759
Middle	65	.412	.140	.114	.695
High School	64	.479	.111	.201	.721
Mathematics					
Elementary	53	.406	.142	.091	.675
Middle	55	.493	.097	.288	.668
High School	60	.448	.100	.214	.675

Section B: Summary of Item Response Theory Indices

IRT models are represented by statistical functions which relate person and item characteristics to the probability of choosing a correct item response. IRT uses a model based approach to: estimate item parameters, determine how well the data fit the model, and to investigate the psychometric properties of items and tests (Baker, 2001). A one-parameter IRT model, the Rasch model, was applied to the SC-Alt operational test data to obtain item parameters and fit information. Three IRT indices were included on the dataset: Infit and Outfit fit statistics, and Rasch item difficulty. Items were flagged if they exhibited differential performance for one subgroup compared to another. Items exhibiting differential item functioning (DIF) may be easier or more difficult for one demographic group compared to another, and should be examined to rule out the possibility that they may bias the test results.

A characteristic of the Rasch model is that all items are thought to have the same item discrimination, but varying levels of item difficulty. The difficulty parameter is defined as the point on the ability scale at which the probability of correct response to the item is .5, where the slope of the Rasch curve is at a maximum. Typical values are within the range $-3 <\; = $ *difficulty* $<\; = +3$. (Baker, 2001). Item difficulty parameters can be interpreted relative to ability level. As stated in Baker (2001, p. 34-35) " an item whose difficulty is -1 functions among lower ability examinees while an item with a difficulty value of $+1$ does best to distinguish between examinees functioning at higher ability levels."

Both Infit and Outfit are fit statistics, which indicate in the Rasch context how accurately the data fit to the Rasch model. As stated by Bond & Fox (2001):

> Outfit statistics have more emphasis on unexpected responses far from a person's or item's measure. Infit statistics place more emphasis on unexpected responses near a person's or item's measure.

Stated another way by the Winsteps user's manual (Linacre, 2006, http://www.winsteps.com/winman/diagnosingmisfit.htm**)**

> Outfit measures are more sensitive to unexpected observations by persons on items that are relatively very easy or very hard for them (and vice-versa). Infit measures are more sensitive to unexpected patterns of observations by persons on items that are roughly targeted on them (and vice-versa).

Infit and outfit values can be reported as unstandardized values, standardized values, or mean square values. To be consistent with the infit/outfit item flag information, mean square values will be discussed. Mean square values are computed as the Rasch model chi-square statistic divided by its degrees of freedom (http://www.winsteps.com/winman/diagnosingmisfit.htm). Expected values for the mean squares should approximate 1.0. Values greater than 1 (underfit) indicate unmodeled noise or other source of variance in the data and may degrade measurement. Values less than 1 (overfit) indicate that the model predicts the data too well, and may cause summary statistics to report inflated values.

IRT Difficulty Indices

Rasch item parameters provide a modern test theory perspective of item difficulty. Most difficulty values for the SC-Alt operational items are functioning slightly below the mean ability level of 0 for both ELA and Math. The information shows that the items are functioning best for students with slightly lower than average ability levels in this population of students. The SC-Alt High School forms are slightly harder for students, as shown by mean difficulty values closer to 0. For mathematics, the Elementary test is the least difficult, with mean difficulty values at -.58. The SC-Alt Middle School and High School forms are more difficult, with difficulty values of -.46 and -.32, respectively. Overall, the tests are increasing in difficulty as the grade band increases.

Difficulty values are negative for the SC-Alt ELA and mathematics forms, meaning that the items function best with students who have lower than average ability. Calculations showed that mean Rasch difficulty values for each form were smaller than the median Rasch difficulty values, reflecting negative skewness in the distribution of IRT difficulty scores. For ELA and mathematics item statistics, difficulty values appear to be within acceptable ranges. Standard deviation values are above .55, suggesting that the assessments included a reasonable range of item difficulties. Table 5 provides summary statistics across the SC-Alt ELA and mathematics forms.

Table 5. IRT Based Difficulty Values, by Form

Form and Age Band	Number of Items	Mean Difficulty	Standard Deviation	Minimum Difficulty	Maximum Difficulty
ELA					
Elementary	68	-.57	.75	-2.26	1.04
Middle	65	-.56	.72	-2.26	1.04
High School	64	-.19	.55	-1.73	.98
Mathematics					
Elementary	53	-.58	.66	-2.26	.87
Middle	55	-.46	.70	-2.26	.87
High School	60	-.32	.68	-2.26	1.25

Infit and Outfit Measures

Tables 6 and 7 below provide the mean square values for infit and outfit. For both infit and outfit mean square values, mean values suggest adequate fit. All items appear to have average levels of infit/outfit close to the expected value of 1. This indicates that the Rasch model provides an acceptable fit to the operational test data for the SC-Alt ELA and SC-Alt mathematics forms.

Table 6. Average Standardized Infit Values, by Form

Operational Form and Age Band	Number of Items	Mean Infit	Standard Deviation	Minimum Infit	Maximum Infit
ELA					
Elementary	68	1.00	.16	.72	1.49
Middle	65	1.00	.17	.78	1.49
High School	64	1.01	.16	.74	1.51
Mathematics					
Elementary	53	1.00	.12	.75	1.39
Middle	55	1.00	.12	.74	1.39
High School	60	1.04	.15	.83	1.74

Table 7. Average Standardized Outfit values, by Form

Operational Form and Age Band	Number of Items	Mean Outfit	Standard Deviation	Minimum Outfit	Maximum Outfit
ELA					
Elementary	68	1.00	.26	.54	1.83
Middle	65	.99	.29	.44	1.83
High School	64	.97	.25	.49	1.66
Mathematics					
Elementary	53	.98	.21	.57	1.60
Middle	55	1.00	.18	.58	1.60
High School	60	1.05	.23	.67	2.09

Differential Item Functioning

Items on the SC-Alt ELA and mathematics subtests were examined for differential item functioning (DIF). DIF analyses identify items that do not perform equally across subgroups of the SC-Alt population. Comparisons were made between sex groups (male and female students) and racial groups (Black and Caucasian students). If many items exhibit DIF, the test may give one group an unfair advantage (disadvantage) over other test takers. Here, DIF is discussed in general terms. Specific items that are exhibiting DIF are named in the Item Flags section.

For the SC-Alt ELA tests, two items reported differential item functioning at severe levels on the middle school form and six items showed problems on the high school form. No items exhibiting DIF were found on the SC-Alt ELA Elementary form. For the two items reporting DIF on the middle school form, both items were cited for differential performance based upon students' sex. On the high school form, all six items yielded differential functioning depending on student race.

These items could be reviewed for problems (such as content, wording, etc.) to try to eliminate DIF in future administrations of the SC-Alt ELA tests.

For the SC-Alt mathematics tests, only the high school form reported items that exhibited DIF. There were no items that exhibited DIF on the SC-Alt Middle School or Elementary forms. For the items showing DIF on the SC-Alt high school mathematics form, four of the items reported differential performance between sexes, seven items reported differential performance between racial groups, and two items exhibited DIF for both sex and race subgroups. As with the SC-Alt ELA items that showed evidence of DIF, items exhibiting DIF on the SC-Alt mathematics forms may be reviewed to try to eliminate DIF in future administrations of the SC-Alt ELA tests. This suggestion is more pressing for items that exhibit DIF across both sex and racial groups. It is also recognized that the SC-Alt high school sample size is the smallest of the three forms. The small sample size, and even smaller subgroup sample sizes, may exert undue influence on the item statistics.

Item Flags

A flagged item suggests that the performance may be problematic and the item may need a closer inspection. Items were flagged by the SDE for a variety of performance indicators. While many flags could be noted, the six flags that were present in the SC-Alt dataset are described below. Descriptions of the item flags were taken from the SDE/AIR data codebook:

- Difficulty flags indicated items that were excessively hard ($p < .30$) or too easy ($p > .95$)

- Point biserial flags for low biserial correlations ($r_{pb} < .20$) meaning that the item was not discriminating between students of higher and lower ability levels.

- Differential item functioning (DIF) illustrates that an item may be easier or more difficult for one demographic group compared to another

- Fit if infit <.7 or infit >1.3 or outfit <.7 or outfit >1.3

- Omit flags suggest that the item's omit rate is too large, i.e., >.05, meaning that roughly 5% of the students' omitted this item

- CRT flagged items were those flagged if the mean total test score of students in a score point category was lower than the mean total test score of students in the next lowest score point category. For example, if students who received 3 points on a constructed response item scored, on average, lower on the total test than students who received 2 points on the item, the item would be flagged. This situation may indicate that the scoring rubric is flawed.

For the SC-Alt database, all item characteristics were examined. Items were flagged for violating one rule or a combination of the rules.

Information concerning flagged items on the SC-Alt ELA tests is provided in Table 8. As Table 8 shows that 53 out of 197 ELA items were flagged for various problems. Stated another way, approximately 26.9% of the set of ELA items yielded item statistics which were outside of the stated bounds. The percent of items showing problems was 13 of 68 (19.1%) of items flagged on the elementary form, 18 of 65 (27.7%) of items flagged on the middle school form, 22 of 64

(34.4%) of items flagged on the high school form. The number of flags observed is somewhat surprising given that the test has already undergone item screening, item revision, and field-testing procedures. However, the majority of flags were given infit/outfit statistics being outside of stated boundaries. The information suggests that the model is not predicting the data accurately, where unmodeled variance may be present. This variance could be due to other sources such as individual student characteristics, disability type, or even student fatigue.

Differential item functioning (DIF) is a more serious flag. As discussed earlier, items exhibiting DIF were found on the middle and high school SC-Alt ELA forms. While DIF indicates differential performance, there are relatively few items out of the entire test that exhibit DIF. Also, it is noted that there are relatively few students in the entire SC-Alt population as compared to the mainstream population of students. Depending on the size of the subgroup, if high numbers of students from a subgroup have problems with an item small sample size could lead to misrepresentation of an item's performance.

Table 8. Item Flags, SC-Alt English Language Arts Tests

Flags				
Form	No. Of occurrences	Percent Flagged	Type of Flag(s)	Item numbers
ELA	**53**			
Elementary	13			
	1		r_{pb}	60
	7		Fit	24, 41, 49, 58, 63, 64, 66
	1		Omit & Fit	7
	4		r_{pb} & Fit	57, 61, 65, 67
Middle	18			
	2		r_{pb} & Fit	54, 64
	13		Fit	52 49 32 1 40 36 48 62 34 8 15 35 33
	2		DIF	3 13
	1		Omit	2
High School	22			
	2		Crt	13 52
	5		DIF	56 18 32 11 3
	13		FIT	58 54 25 22 33 62 46 55 10 1 48 29 53
	1		CRT & Fit	63
	1		Omit & DIF	6

Information concerning flagged items on the SC-Alt mathematics tests is provided in Table 9. Across the three forms, 35 out of 168 mathematics items were flagged (20.8%).The percent of items showing problems was low by form with 14 of 53 (26.4%) of items flagged on the elementary form, 5 of 55 (9.1%) of items flagged on the middle school form, 16 of 60 (26.7%) of items flagged on the high school form. Again, the numbers of SC-Alt mathematics items flagged was somewhat unexpected given that the mathematics has already undergone item screening, item revision, and field-testing procedures.

Overall, most SC-Alt mathematics items were flagged for evidence of infit and/or outfit statistics. This means that the items are not performing adequately and are producing scores that may be unexpected. Again, while this flag is present, it is not overly serious. Other flags, such as point

biserial, CRT, and Omitted items, were observed, but these flags made up a relatively small percent of the total of flagged items.

The SC-Alt mathematics High School form showed the most flags, roughly 27% of the test items cited. The most disconcerting information here is the number of items showing evidence of DIF, meaning that the items were performing differently for different subgroups of test takers. Nine of the 16 flagged items showed presence of DIF. These items may be re-examined to determine if the amount of differential functioning is high enough to bias the test for different groups of SC-Alt students.

Table 9. Item Flags, SC-Alt Mathematics Tests

			Flags	
Form	No. of occurrences	Percent Flagged	Type of Flag(s)	Item numbers
Mathematics	**35**	**20.8**		
Elementary	**14**	**26.4**		
	7		Fit	1, 27, 30, 38, 44, 45, 46
	4		r_{pb}	47, 48, 49, 52
	1		r_{pb} & Fit	53
	2		Omit	3, 5
Middle	5	9.1		
	4		Fit	1, 26, 31, 55
	1		CRT	47
High School	16	26.7		
	5		Fit	1, 28, 39, 53, 58
	7		DIF	3, 30, 41, 44, 47, 50, 59
	1		CRT	57
	1		Fit & CRT	24
	1		Fit & DIF	60
	1		CRT & DIF	9

Section C: Estimates of Impact

To judge impact of the SC-Alt, the assessments should be able to categorize students into different ability levels, according to the amount of knowledge students possess in a given content area. The SC-Alt assessments categorize students into one of four achievement levels. The levels are named 1, 2, 3, and 4, where level 1 represents the lowest achievement level and level 4 represents the highest achievement level on the SC-Alt. The descriptions of the SC-Alt achievement levels were created by the SDE and AIR and provide a detailed assessment of student competencies and skills that students must demonstrate to be "graded" at a specific level of performance. Performance descriptors vary by content area and grade level band. While detailed information about the achievement level descriptors is provided in the SC-Alt Standard Setting Technical Report (AIR, September, 2007), a generic description of the achievement levels is provided in Table 10. The generic description shows the increasing performance and knowledge requirements for the SC-Alt in ELA and mathematics as the achievement level increases from level 1 to 4.

Table 10. Generic Description of SC-Alt Assessment Achievement Levels

Level	Generic description of SC-Alt Assessment Achievement Levels
Level 1	Students performing at level 1 may demonstrate emerging academic skills and competencies in ELA (mathematics).
Level 2	Students performing at level 2 demonstrate foundational academic skills and competencies in ELA (mathematics).
Level 3	Students performing at level 3 demonstrate increasing academic skills and competencies in ELA (mathematics).
Level 4	Students performing at level 4 demonstrate and apply academic skills and competencies in ELA (mathematics).

AIR, under contract to the SC SDE, held a workshop to recommend performance standards for the SC-Alt assessments. The workshops were held June 25-27, 2007 and involved 105 educators and non-educators (e.g., parents, curriculum specialists) from across the state. The panel recommended standards to categorize students into levels 2, 3, and 4 on the SC-Alt assessments. The standards were translated into cut points on the SC-Alt tests by AIR.

Using the information from the cut scores, it is of interest to estimate the impact of the SC-Alt assessments by evaluating average student ability estimates for the SC-Alt ELA and mathematics tests. It is noted that the information evaluated in Table 11 was taken directly from AIR technical documentation. At the time of this report (September 5, 2007), impact results for the spring 2007 administration of the SC-Alt have not been published by the SDE. The information presented in Table 11 allow for an initial investigation of impact; however, additional impact data may be examined and evaluated at a future date.

Table 11 shows the range of ability estimates for each performance level on the SC-Alt ELA and mathematics tests. Ability estimates range from negative infinity to positive infinity, thus no minimum for level 1 and maximum for level 4 are needed in the table. As expected, the higher the performance level, the higher the students' estimated ability. Ability estimates were lower than average (i.e., ability = 0) only for the lowest performance levels, levels 1 and 2. Overall, the SC-Alt ability estimates appear to be within adequate ranges and the categorization of students into different performance levels allows for differentiation of students at different ability levels.

Table 11. Estimates of Impact by Grade Range, SC Alt Assessment

	Level	Cut Scale Score	Minimum Ability Estimate	Maximum Ability Estimate
ELA Grade 3-5	Level 1	--	*	-1.21
	Level 2	403	-1.20	-0.03
	Level 3	466	-0.02	0.66
	Level 4	491	0.67	*
ELA Grade 6-8	Level 1	--	*	-0.89
	Level 2	417	-0.88	0.18
	Level 3	473	0.19	0.79
	Level 4	501	0.80	*
ELA Grade 10	Level 1	--	*	-0.94
	Level 2	429	-0.93	-0.03
	Level 3	478	-0.02	0.66
	Level 4	503	0.67	*
Math Grade 3-5	Level 1	--	*	-1.07
	Level 2	423	-1.06	0.08
	Level 3	476	0.09	0.73
	Level 4	526	0.74	*
Math Grade 6-8	Level 1	--	*	-1.01
	Level 2	425	-1.00	0.08
	Level 3	476	0.09	0.95
	Level 4	529	0.96	*
Math Grade 10	Level 1	--	*	-0.93
	Level 2	434	-0.92	-0.28
	Level 3	476	-0.27	0.50
	Level 4	528	0.51	*

Notes: No cut score is needed to categorize students into Level 1.

Summary and Recommendations

This report summarizes the results from the spring 2007 operational administration of the South Carolina Alternate (SC-Alt) assessments. The SC-Alt is geared towards students with cognitive deficiencies who are unable to take the regular state assessments, even with modifications. The Education Oversight Committee (EOC) supported the current study as part of its responsibilities listed in the Education Accountability Act of 1988. This study reviewed item and form data from the English Language Arts (ELA) and Mathematics forms administered spring 2007. Test information was presented for three age bands: Elementary (3-5), Middle school Form (6-8) and High School (10). Indices of Classical Test Theory (CTT) and Item Response Theory (IRT) were interpreted by form and subject area. Based on the results, the following evaluations and recommendations are provided.

A strength of the SC-Alt assessment battery is the interrelationship between the components of the assessment system. The SC-Alt tests were revised to include performance tasks, which were thought to better estimate the knowledge and ability of students with significant cognitive disabilities. Also, multiple sources of evidence collected over a long period of time are evaluated to determine if a student is eligible for the SC-Alt instead of the state's mainstream testing program. Using a variety of evidence collected from multiple sources helps ensure that students in need of the alternative program are eligible for the assessment. This helps to provide an accurate reflection of the population of cognitively disabled students across the state. Finally, the standardized training given to test administrators for student placement on the test and scoring of responses helps to ensure that the scores obtained from the SC-Alt are valid measures of student ability and can be trusted to make inferences of student ability.

Overall, the SC-Alt ELA and mathematics tests appear to be functioning adequately for the three different grade bands studied. It was noted that the sample size used to calculate CTT and IRT statistics with the high school test (Grade 10) was lower than the sample sizes used in the other two tests. However, the SC-Alt population is a special needs population where relatively few students across the state fall into this category (estimate of .5% of SC public school students).

The ELA and mathematics forms generally reported CTT and IRT item statistics which were within acceptable ranges. The tests are of increasing difficulty and can be used to differentiate students based on ability. The Student Placement Questionnaire helps ensure that students gain an optimal starting place to measure their content knowledge. Both CTT and IRT estimates of difficulty reported that the test was performing adequately; for a given form, students answered approximately 60% of items correctly. Also, the test reported acceptable levels of discrimination, indicating that the ELA and mathematics tests were able to distinguish between high and low ability students. The test is not maximally discriminating; however, this may be acceptable given the requirements of the SC-Alt testing program.

In terms of item performance, many items were flagged due to problematic item statistics. It is noted that the majority of flags were given for infit/outfit IRT measures rather than something more serious. However, roughly one third of the items on a given form were flagged for some sort of problematic behavior. It is recommended that the items be reviewed with future operational administrations of the test. Over 15 items showed significant Differential Item Functioning (DIF) between subgroups of SC-Alt students on either the ELA or mathematics forms. These items should be investigated further to ensure that items do not function differently for subgroups of students. It is recommended that these items be reviewed in future

administrations of the SC-Alt examination. If many items are still problematic, the items may be reviewed to see if wording problems are apparent or if increasing item clarity may improve item performance. Finally, because impact data were not available at the time of this report, future evaluations of SC-Alt test data should evaluate estimates of impact to ensure that the estimates of student ability are in agreement with the objectives of the SC-Alt. This should include an evaluation of the percentage of students classified into each performance level (i.e., level 1 through level 4), review of ability estimates by performance level, and review of the grading rubrics used to categorize student performance.

In summary, the technical information suggested that the SC-Alt ELA and mathematics forms were performing acceptably. Selected items showing DIF and performance rubrics for ELA were suggested for review with data from future operational administrations of the tests. Overall, the SC-Alt appears to perform effectively to assess South Carolina's students with significant cognitive disabilities.

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EDUCATION OVERSIGHT COMMITTEE

Subcommittee: <u>EIA and Improvement Mechanisms</u>

Date: <u>October 8, 2007</u>

REPORT/RECOMMENDATION

Annual Report on the South Carolina Teacher Loan Program

PURPOSE/AUTHORITY

The Teacher Quality Act of 2000 provides that the South Carolina Education Oversight Committee "shall review the [SC Teacher] loan program annually and report to the General Assembly" (Section 59-26-20 (j), SC Code of Laws of 1976, as amended.) This report is the annual report on the SC Teacher Loan Program covering the year 2006-2007.

CRITICAL FACTS

TIMELINE/REVIEW PROCESS

Study began in fall 2006, completed in September 2007.

ECONOMIC IMPACT

    Cost: Fiscal impact not calculated

    Fund/Source:

ACTION REQUEST

☒ **For approval**   ☐ **For information**

ACTION TAKEN

☐ **Approved**   ☐ **Amended**

☐ **Not Approved**   ☐ **Action deferred (explain)**

2007-2008

THE SOUTH CAROLINA TEACHER LOAN PROGRAM

Annual Review

Summary

The Teacher Loan Program (TLP) was created in 1984 as part of the Education Improvement Act to recruit individuals into teaching in critical needs areas and critical needs schools. In 2000 the South Carolina General Assembly directed the Education Oversight Committee to conduct an annual review of the program and to report their findings to the General Assembly. The first report was issued in 2002 and subsequent annual reports were issued in 2003, 2004, 2005, 2006 and 2007. The basic components of each report have remained the same over the continuum of reports, though there have been individual different research questions analyzed each year. The 2007 report found that: the statistical data presented in previous years remained constant through the 2006-07 academic year; that the program continues to attract individuals into the teaching profession; that the program still lacks identified and adopted goals and objectives; that a Policy Governance Board to market the program and set policy decisions to improve the communication about the program needs to be established; that the average SAT scores of TLP recipients continues to increase; and that the vast majority of loan applicants and recipients continue to be white females.

The South Carolina Teacher Loan Program

<u>**Statutory Authority**</u>

The South Carolina Teacher Loan Program was established through action of the South Carolina General Assembly with the passage of the Education Improvement Act of 1984.

> According to the Code of Laws of South Carolina (Title 59, Section 26j):
>
> the Commission on Higher Education, in consultation with the State Department of Education and the staff of the South Carolina Student Loan Corporation, shall develop a loan program whereby talented and qualified state residents may be provided loans to attend public or private colleges and universities for the sole purpose and intent of becoming certified teachers employed in the State in areas of critical need. Areas of critical need shall include both geographic areas and areas of teacher certification and must be defined annually for that purpose by the State Board of Education.

The intent of the legislation was to encourage prospective students to become teachers and to remain in the State teaching in areas of critical need by offering loans that could be cancelled (or forgiven) if the teacher taught in a critical needs area. The program was one of a number of incentive-related programs included in the 1984 legislation. Beginning with an initial appropriation of $1.5 million, the annual appropriation for the Teacher Loan Program has varied from $1.2 to $5.3 million since the inaugural year. Including budget transfers, funds available through repayment, and excluding administrative cost, the actual amount loaned should exceed $6.0 million during 2007-08. The Student Loan Corporation (SLC) administers the program for the state of South Carolina. Since the inception of the program over 14,000 individuals have received a loan for at least one year.

According to regulations from the Commission on Higher Education, eligible applicants for teacher loans must meet the following criteria:

- Be a United States citizen;
- Be a resident of South Carolina;
- Be enrolled in good standing at an accredited public or private college or university on at least a half-time basis;
- Be enrolled in a program of teacher education or have expressed intent to enroll in such a program;
- Be in good standing on any other student loan;
- Be in the top 40 percent of their high school graduating class;
- Have an SAT or ACT score equal to or greater than the SC average for the year of graduation from high school or the most recent year for which data are available;

- For students currently enrolled as undergraduate students, have taken and passed the Praxis I; and,
- Have an undergraduate cumulative grade point average of at least 2.75 on a 4.0 scale.

Graduate students who have completed at least one semester must have a grade point average of 3.5 (on a 4.0 scale) and must be seeking initial certification in a critical subject area if the applicant already holds a teaching certificate.

Participants in the state's Career Changers Program are also eligible to receive loans from the South Carolina Teacher Loan Program. This program, established by the General Assembly in 2001, received $1,622,662 in 2006-07. The Career Changers Program was designed to recruit persons with undergraduate degrees in areas other than teaching who have been working for at least three years. The program also recruits instructional assistants in the public schools of South Carolina who have been employed for a minimum of three years. Finally, since 2000, participants in the South Carolina Program for Alternative Certification for Educators (PACE) have been eligible to receive loans for courses required for certification.

College freshmen and sophomores may receive loans for up to $2,500 per year, while juniors, seniors, and graduate students may borrow up to $5,000 per year. The maximum total loan amount for any individual student is currently $20,000. PACE participants are limited to $1,000 per year and cannot exceed an aggregate amount of $5,000. Individuals in the Career Changers Program are eligible to borrow up to $15,000 per year and up to an aggregate maximum of $60,000. Regardless of program, the loan can be used for any purpose at the discretion of the recipient; it is not designated for tuition, room, board, books, etc.

Under current guidelines, teacher loans, whether to undergraduates, PACE participants, or Career Changers, may be cancelled at the rate of 20 percent annually or $3,000, whichever is greater, for each full year of teaching in a critical subject **or** a critical geographic area within the state. Should both criteria be met, teaching in a critical subject **and** in a critical geographic area, the loan may be cancelled at an annual rate of 33.33 percent or $5,000, whichever amount is greater. The State Board of Education annually reviews potential need areas and makes appropriate designations, therefore, areas of critical need may change from year to year. Generally, the subject areas deemed critical at the time of application are honored for cancellation when the individual begins teaching. The critical geographic area designation must be deemed critical at the time of employment. Should the loan recipient decide not to teach, the

interest rate is set at the interest rate charged on Stafford Loans, plus an additional 2 percent. The interest rate for the TLP has been capped at 10.25 percent, and is presently 8.8 percent.

In 2000, the Teacher Quality Act directed the Education Oversight Committee (EOC) to conduct annual reviews of the South Carolina Teacher Loan Program and to report their findings to the South Carolina General Assembly. The EOC has conducted a series of studies of the program, the most recent in September 2007. Findings from previous reports can be found in the Appendix.

Funding of the Teacher Loan Program

With funds from the Education Improvement Act Trust Fund, the General Assembly has appropriated monies to support the loan program in the amounts shown in Table 1. Data in the table also include the administrative costs of the program and the amount of funds utilized from repayments.

Table 1
SC Teacher Loan Program: Revenues and Loans Over Time

Year	Appropriation	Legislatively Mandated Transfers	Revolving Funds from Repayments	Total Dollars Available	Administrative Costs	Percent of Total Dollars Spent on Administration	Amount Loaned
1984-85	1,500,000	0	0	1,500,000	124,033	8.3	300,000
1985-86	1,250,000	0	0	1,250,000	71,214	5.7	1,008,115
1986-87	1,943,059	75,000[1]	0	1,943,059	84,376	4.3	1,776,234
1987-88	2,225,000	75,000[1]	100,000	2,325,000	98,976	4.3	2,277,402
1988-89	2,925,000	75,000[1]	350,000	3,275,000	126,941	3.9	2,889,955
1989-90	3,300,000	0	300,000	3,600,000	154,927	4.3	3,284,632
1990-91	4,600,000	1,000,000[2]	300,000	4,900,000	210,741	4.3	3,978,476
1991-92	4,600,000	1,000,000[2]	900,000	5,500,000	217,981	4.0	4,350,908
1992-93	4,775,000	1,175,000[2]	1,350,000	6,125,000	248,703	4.1	4,628,259
1993-94	4,775,000	1,175,000[2]	1,350,000	6,125,000	254,398	4.2	4,805,391
1994-95	5,016,250	1,233,750[2]	1,135,000	6,151,250	272,260	4.4	4,761,397
1995-96	3,016,250	0	1,885,000	4,901,000	219,058	4.5	3,999,053
1996-97	3,016,250	0	1,108,500	4,124,500	222,557	5.4	3,936,538
1997-98	3,016,250	0	2,067,000	5,083,000	248,704	4.9	4,393,679
1998-99	3,016,250	1,000,000[3]	2,565,000	4,581,250	295,790	6.5	4,423,446
1999-2000	3,016,250	1,000,000[3]	2,550,000	4,566,250	272,115	5.0	4,240,693
2000-2001	3,916,250	0	3,000,000	6,916,250	279,800	4.1	5,556,854
2001-2002	3,016,250	145,216*	3,265,000	6,136,034	321,058	5.2	5,815,382
2002-2003	2,863,826	144,471*	2,950,000	5,669,355	346,601	6.1	5,332,946
2003-2004	3,016,250	129,980*	2,953,266	5,863,826	362,600	6.2	5,476,936
2004-2005	3,209,270	0	1,821,610	5,030,880	392,375	7.8	4,638,505
2005-2006	5,367,044	0	354,175	5,721,219	402,300	7.0	5,318,915
2006-2007	5,367,044	0	939,900	6,306,944	437,885	7.0	5,869,059
2007-2008	5,367,044	0	1,070,841**	6,437,885**	437,885**	6.8**	6,000,000**

*Source: SC Student Loan Corporation, 1995-2007. *Mid-year budget cuts. [1]Transfered to SC State for minority recruitment. [2]Transfered to Governor's Teaching Scholarship Program. [3]Transfered to SDE for technology and GT identification; ** projected amounts*

The appropriation by the General Assembly increased from $3.2 million in 2004-05 to almost $5.37 million in response to recommendations made by the EOC in the 2004 report to increase the total amount a student could borrow over time and to provide sufficient funds to cover the number of students who were unable to obtain loans the previous year. The recommendation to increase the total amount that can be loaned to a student resulted from data demonstrating that tuition had increased an average of over 300 percent at the state's public institutions since 1984-85, but the amount a student could borrow had not increased. Tuition at private colleges had increased as well. The tuition figures did not include the cost of room and board, books or transportation for students; all had increased significantly over the twenty year period.

Critical Need Identification

In the Education Improvement Act, the General Assembly assigned the duty of defining the critical need areas to the State Board of Education (SBE): "Areas of critical need shall include both rural areas and areas of teacher certification and shall be defined annually for that purpose by the State Board of Education." Beginning in the fall of 1984, the SBE has defined the certification and geographic areas considered critical and subsequently those teaching assignments eligible for cancellation. Only two subject areas – mathematics and science - were designated critical during the early years of the programs, but recent teacher shortages have expanded the number of certification areas. To determine the subject areas, the South Carolina Center for Educator Recruitment, Retention and Advancement (CERRA) conducts a Supply and Demand Survey of all 85 South Carolina school districts, the Department of Juvenile Justice and the South Carolina School for the Deaf and the Blind. Beginning in 2002-03, subject areas with twenty percent or higher vacancy rates and/or are filled with candidates who are not fully certified in the subject area are designated critical need. For 2007-08, Physical Education and Early Childhood Education were added to the list in response to anticipated shortages as a result of the Student Health and Fitness Act of 2005 and the Education Oversight Committee's Interim Report on the First Year Implementation of the Child Development Education Pilot Program (CDEPP), respectively.

- All Middle Level Areas
- Art
- Business Education
- Dance
- Early Childhood Education
- English/Language Arts
- Family and Consumer Science
- Foreign Languages (Spanish, French, German, and Latin)
- Industrial Technology
- Mathematics
- Media Specialist
- Music
- Physical Education
- Science (Biology, Chemistry, Physics and Science)

- Special Education (all areas)
- Speech and Drama, Theater
- Speech Language Therapist

Today, few areas of certification are not considered critical need areas; they include social studies, agriculture, health, and school psychologists. The SBE had considered multiple factors in designating rural critical geographic areas over the last twenty years, including degree of wealth, distance from shopping and entertainment centers, and faculty turnover. Over the life of the program, the designation of critical geographic area has changed. In 1984-85, 69 of the 91 school districts qualified as critical geographic districts. In 1994, schools in urban districts that had one of the fifteen highest average teacher turnover rates over the previous three years also were designated as critical geographic need schools in order to assist those districts in the recruitment of teachers. Then, at the beginning of the 2000-01 school year, the SBE adopted the criteria established for the federally funded Perkins Loan Program as the criteria for determining critical need schools. The Perkins Loan Program uses free and reduced lunch figures to determine schools eligible for loan forgiveness. For the 2002-03 and 2003-04 school years, 984 of the 1106 South Carolina public schools (89 percent) qualified for critical geographic need.

During the 2004 legislative session, changes were made to the definition of critical geographic area through Proviso 1A. 50. The proviso read:

> Notwithstanding the provision of Section 59-26-20 (j) for those students seeking loan cancellation under the Teacher Loan Program after July 1, 2004, "critical geographic area" shall be defined as schools that have an absolute rating of below average or unsatisfactory, schools where the average teacher turnover rate for the past three years is 20 percent or higher, or schools that meet the poverty index criteria at the 70 percent level or higher. The list shall also include special schools, alternative schools, and correctional centers as identified by the State Board of Education.

Loan recipients serving in schools identified as critical geographic need under the Perkins Loan criteria are able to continue to cancel their loans at those schools through a grandfather provision. The net effect of the change in the law was that for 2005-06 only 534 of the 1106 public schools, 48.28 percent, qualified for critical geographic need designation. For 2007-08, the number of schools qualifying for critical geographic need designation increased to 702 of 1187 school units (some schools have both elementary and middle or middle and high grade levels, 59.1 percent). Over time the changes in the designation of critical geographic needs

schools will probably increase as the poverty factor increases state wide; more schools will be designated as critical geographic need schools as a result.. The change in the critical geographic need designation, however, will not affect the number of teachers qualifying for cancellation based on the critical need subject area, but may affect how quickly some teachers will be able to cancel their loans.

Of utmost interest is whether the TLP is providing long term solutions to staffing in critical geographic need schools or whether teachers are staying in the schools just long enough to completely cancel their loan. If the teachers are moving at the end of the cancellation period or migrating from school to school on a frequent basis, then the TLP is not meeting one of the goals of the program: to help solve the staffing needs of critical geographic need schools on a stable basis. An analysis of the data from loan cancellation files during the preparation of the 2005 report found that 2,054 individuals had completed cancellation of their loans between the 1994-95 and 2004-05 academic years. Of those individuals, 77.5 percent (1,592 of 2,054) had taught in only one or two schools during their career. Only twenty-nine individuals had taught in five or more schools. Furthermore, for individuals teaching and still in the process of canceling their loans, 93 percent (1,888 of 2,030) had taught at only one or two schools; only five had taught in five or more schools. Overall, recipients of loans did not appear to change schools frequently or leave the qualifying school immediately after completing cancellation; thus, the program is helping provide some stability in school staffing. The pattern may change in the future, however, as a result of the changes in the identification of schools qualifying for critical geographic need. Changes in the pattern may not appear for several years and should be studied as part of the 2007-08 programs report.

Historical Analysis of Applicant Pool
During the first ten years of the Teacher Loan Program, 11,387 individuals received a loan through the Teacher Loan Program (duplicated count, SLC). Specific demographic information is not available for these recipients, but information on applicants since 1994-95 is available. Those records were reviewed to gain an understanding of who applied for and who received the teacher loans. Since 1994-95, the SLC received 24,270 applications for the Teacher Loan Program. The number of applicants is a duplicated count as one applicant could have applied for loans in multiple years. Of the 24,270 applications, 67.3 percent were approved; 25.8 percent were denied and 6.7 percent were cancelled by the applicant. Applications generally were denied for failure to meet the academic grade point criteria (44.3 percent) or for having not passed the EEE or Praxis I, (18.2 percent). The data presented in Table 2 indicates some applications in 1994-95, 1995-96, 2001-02, 2002-03 2003-04, 2004-05, 2005-06 and 2006-07

were denied because of inadequate funds available for the program. Fewer applicants were affected by insufficient funding in 2006-07 than in previous years.

Table 2

Application Status of Applicants 1994-95 through 2006-07

Year	Total Applied*	Approved # (%)	Application Cancelled # (%)	Denied # (%)	Reason for Denial				
					Credit Problem	Academic Reason	No EEE Praxis	Other**	Inadequate loan funds
1994-95	2,242	1,416 (63.2)	176 (7.8)	650 (29)	48	241	69	52	240
1995-96	2,024	986 (48.7)	176 (8.7)	862 (42.6)	8	229	115	20	490
1996-97	1,446	982 (67.9)	118 (8.2)	346 (23.9)	5	262	51	28	
1997-98	1,545	1,117 (72.3)	119 (7.7)	309 (20)	3	201	63	42	
1998-99	1,569	1,138 (72.5)	128 (8.2)	303 (19.3)	10	182	54	57	
1999-00	1,532	1,121 (73.2)	85 (5.5)	326 (21.3)	6	206	69	45	
2000-01	2,028	1,495 (73.8)	112 (5.5)	421 (20.7)	16	244	86	74	
2001-02	2,297	1,536 (66.9)	106 (4.7)	655 (28.5)	8	312	122	56	157
2002-03	2,004	1,332 (66.5)	110 (5.5)	562 (28)	3	219	139	73	126
2003-04	1,948	1,345 (69)	118 (6.1)	485 (24.9)	1	189	125	66	104
2004-05	1,735	1,101 (63.5)	93 (5.4)	541 (31.2)	1	148	65	57	267
2005-06	1,902	1,299 (68.3)	154 (8.1)	449 (23.6)	2	145	102	86	111
2006-07	2,033	1,466 (72.1)	150 (7.4)	417 20.5)	3	206	78	93	37
TOTAL 1995-2007	24,305	16,334 (67.2)	1,645 (6.8)	6,327 (26.0)	114 (.5) (1.8)	2,784 (11.4) (44.0)	1,138 (4.7) (18.0)	759(3.1) (12.0)	1,532 (6.3) (24.2)

*This is a duplicated count of individuals because the same individuals may apply for loans in multiple years.
**"Other" reasons include (1) not a SC resident, (2) enrollment less than half time, (3) ineligible critical area, (4) not seeking initial certification, (5) received the maximum annual and/or cumulative loan and (6) application in process.
Source: SC Student Loan Corporation, 1995-2007.

Applicants for the program remain overwhelmingly white and/or female. The percentage of students failing to report their gender and/or race ranged from 8-13 percent between 2001-02 and 2003-04, decreased to 4 percent in 2004-05, rose again to 17 percent in 2005-06, but fell to 11 percent in 2006-07. The percentage of male applicants increased to 16 percent in 2006-07 but still remains at just over 14 percent of the applicants overall.

Table 3

Distribution of Applicants to the Teacher Loan Program by Gender 1994-95 through 2006-07

Year	Number Applied	Gender					
		Male		Female		Unknown	
		#	%	#	%	#	%
1994-95	2,242	246	11	1,476	66	520	23
1995-96	2,024	305	15	1,692	84	27	1
1996-97	1,446	195	13	1,189	82	62	4
1997-98	1,545	247	16	1,241	80	57	4
1998-99	1,569	261	17	1,267	81	41	3
1999-00	1,532	263	17	1,212	79	57	4
2000-01	2,028	299	15	1,628	80	101	5
2001-02	2,297	288	13	1,769	77	240	10
2002-03	2,004	246	12	1,599	80	159	8
2003-04	1,948	253	13	1,480	76	215	11
2004-05	1,735	261	15	1,413	81	61	4
2005-06	1,902	282	15	1,305	69	315	17
2006-07	2,033	328	16	1,482	73	223	11
TOTAL	24,305	3,474	14	18,699	77	2,078	9

Source: SC Student Loan Corporation, 1995- 2007.

Table 4
Distribution of Applicants to the Teacher Loan Program by Race/Ethnicity
1994-95 through 2006-07

Year	Number Applied	Ethnicity							
		African-American		Other		White		Unknown	
		#	%	#	%	#	%	#	%
1994-95	2,242	210	9	20	1	1,580	70	432	19
1995-96	2,024	271	13	31	2	1,664	82	58	3
1996-97	1,446	236	16	14	1	1,115	77	81	6
1997-98	1,545	258	17	12	1	1,195	77	80	5
1998-99	1,569	301	19	9	1	1,193	76	66	4
1999-00	1,532	278	18	14	1	1,164	76	76	5
2000-01	2,028	310	15	25	1	1,555	77	138	7
2001-02	2,297	361	16	15	1	1,630	71	291	13
2002-03	2,004	280	14	14	1	1,506	75	204	10
2003-04	1,948	252	13	13	<1	1,426	73	257	13
2004-05	1,735	263	15	17	1	1,357	78	98	6
2005-06	1,902	267	14	28	1	1,416	74	191	10
2006-07	2,033	356	17	20	1	1,495	74	162	8
TOTAL	24,305	3,643	15	232	<1	18,296	75	2,134	9

Source: SC Student Loan Corporation, 1995-2007.

Neither the program-enabling legislation nor related regulations establishes a program objective addressing different demographic groups. Twice, however, money from the program was earmarked for minority recruitment. From 1986-87 through 1988-89, $75,000 was earmarked for South Carolina State University to recruit minority students. And in 1995-96, a proviso set aside up to $5,000 per district for qualified minority students. South Carolina State University still receives a separate allocation for minority student recruitment. The allocation was $467,000 in 2006-07 and remains at that level for 2007-08. Loan recipients at the historically African-American institutions remain, however, disturbingly low. In 2006-07, 188 African American individuals received a loan, and increase from 130 in 2005-06. Of the 188 who indicated they were African-American, none attend Morris College, two attended Claflin University, 12 attended Benedict College, and 19 attended South Carolina State University. In 2005-06, Morris College again had no recipients, Claflin College two, Benedict College three, and South Carolina State University had 15 of the 130 recipients who indicated they were African-American.

The TLP continues to appeal overwhelmingly to undergraduate applicants. Table 5 showcases applicant patterns by academic status. Although only 19 percent of program applicants are freshmen, consistently 59 percent are continuing undergraduates. This may reflect that students are more willing to commit to a professional program after their initial year of post-secondary education. Interviews with potential graduate student loan applicants identified a

hesitancy to participate in the program because they were uncertain about where they might be living after completing their degrees (due to marriage or impending marriage).

Table 5
Distribution of Applicants to the Teacher Loan Program by Academic Level Status
1994-95 through 2006-07

Year	Number Applied	Academic Level Status									
		Freshman		Continuing Undergrad		1st Semester Graduate		Continuing Graduate		Unknown	
		#	%	#	%	#	%	#	%	#	%
1994-95	2,242	491	22	1,403	60	76	3	171	8	101	5
1995-96	2,024	435	21	1,280	60	92	4	155	8	62	3
1996-97	1,446	261	18	897	60	73	10	164	11	51	4
1997-98	1,545	272	18	876	60	138	10	202	13	57	4
1998-99	1,569	295	19	856	60	146	10	224	14	48	3
1999-00	1,532	331	22	863	60	135	10	196	13	7	<1
2000-01	2,028	440	22	1,087	50	194	10	300	15	7	1
2001-02	2,297	545	24	1,241	54	215	9	291	13	5	<1
2002-03	2,004	336	17	1,183	59	205	10	277	14	3	<1
2003-04	1,948	298	15	1,177	60	194	10	263	14	16	<1
2004-05	1,735	232	13	1,068	62	162	9	256	15	17	1
2005-06	1,902	281	15	1,083	57	231	12	248	13	59	3
2006-07	2,033	363	18	1,157	57	209	10	251	12	53	3
TOTAL	24,305	4,580	19	14,171	58	2,070	9	2,998	12	486	2

Source: SC Student Loan Corporation, 1995-2007

While freshmen have been nineteen percent of the applicants, they have received twenty-two percent of the loans during the period 1994-2007. Continuing undergraduates, including fifth year undergraduates, have received sixty-nine percent of the loans, while graduate students have received nine percent of the loans. While freshmen received twenty-two percent of the loans, sophomores received only twelve percent of the loans. Why is there a drop in loans to sophomores? Three possible explanations include individuals deciding that they do not want to become teachers, people leaving school after freshman year, and individuals no longer meeting the qualifications to receive the loans. There are two primary reasons sophomores may no longer qualify for the loan: their GPA is below a 2.5 and/or they have not passed the Praxis I test required for entrance into an education program. There are no data on how many of the applicants rejected for not having passed the Praxis I exam were rejected for actually failing the exam or simply had not taken the exam. Either way, the applicant would not qualify for additional TLP loans until the Praxis I was passed. A quick look at the loan applications for 2004-05 found that of the 168 freshmen that received a loan in 2003-04, only 104 applied for loans in 2004-05 by the time of this report. Of those 104 applicants, only fifty-two were approved for a loan, thirteen were rejected for having a GPA that was too low, twenty-two were rejected because they had not passed the Praxis, sixteen were denied because the program was out of

money, and one application was withdrawn. For 2004-05, only thirty-one percent of the 2003-04 freshmen class received a TLP loan.

In contrast, in 2003-04 114 sophomores received a loan. For the 2004-05 academic year 111 reapplied for a loan by the time of the 2005 report, with 102 receiving a loan, four canceling the application, four denied for lack of funds, and one denied for not having passed the Praxis I (students receiving money for the first time during their sophomore year have one year to pass the Praxis I like freshmen). Almost 89.5 percent of the sophomores in 2003-04 received money in 2004-05, and 97.4 percent reapplied, compared to only 61.9 percent of the freshmen. The decline in sophomore applications and recipients is a second question that needs further study for the 2007-08 report on the Teacher Loan Program.

As shown in Table 6 and Figure 1, between 1994-95 and 2006-07, the sophomore class usually has been much smaller than the freshmen class except in years that the program did not have sufficient funding (1995-96).

Table 6
<u>Distribution of Recipients of the Teacher Loan Program by Academic Level Status</u>
<u>1994-95 through 2006-07</u>

	94-95	95-96	96-97	97-98	98-99	99-00	00-01	01-02	02-03	03-04	04-05	05-06	06-07
Freshmen	268	8	137	173	292	225	291	318	183	168	121	185	221
Sophomores	143	108	71	105	107	93	145	166	143	114	69	89	148
Juniors	290	246	228	225	228	205	278	306	274	317	248	230	267
Seniors	381	395	359	338	330	324	376	400	396	386	392	419	441
5th Yr Undergrads	37	34	31	37	34	36	48	35	31	55	50	67	61
1st Yr Graduates	64	91	70	165	168	143	231	208	218	187	118	203	212
2nd Yr Graduates	41	45	67	45	67	88	104	82	72	86	82	85	92
3+ Yr Graduates	12	3	18	22	8	7	19	8	13	26	20	21	15

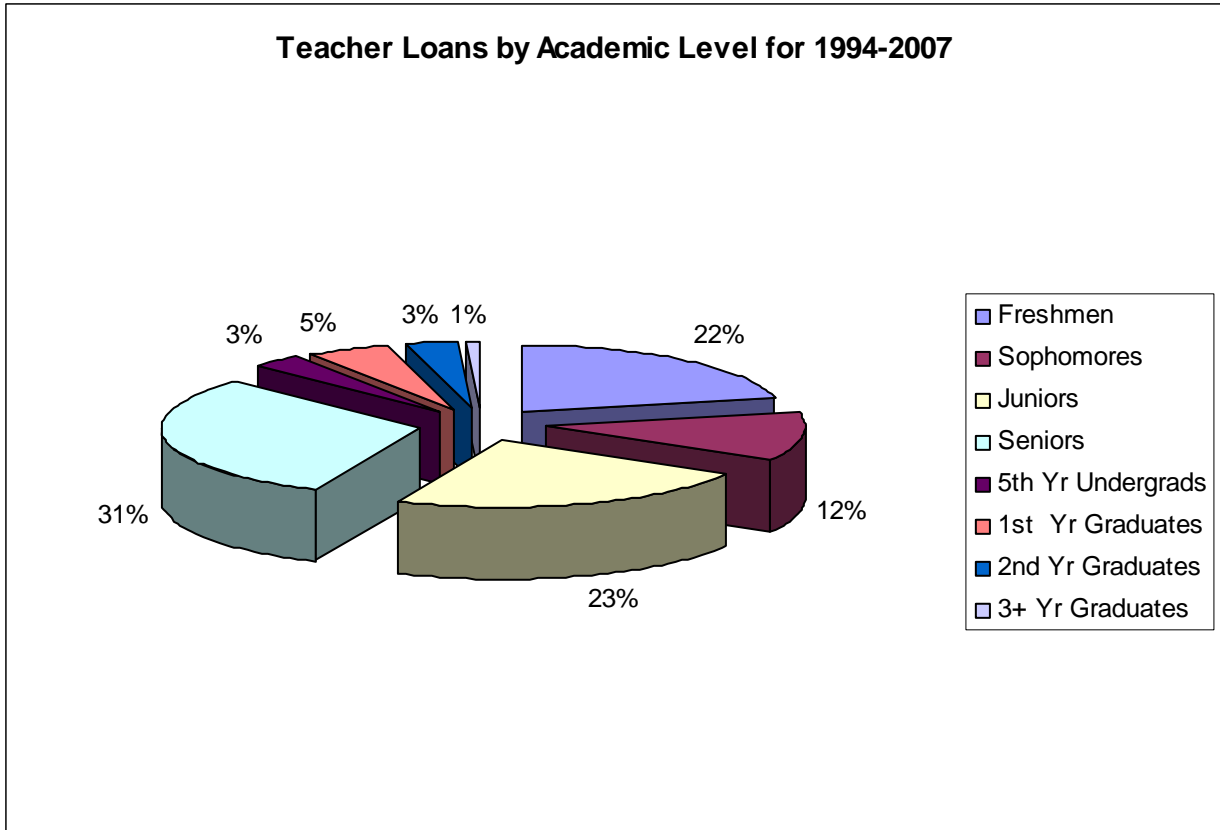*Source: SC Student Loan Corporation, 1995-2007*

Teacher Loans by Academic Level for 1994-2007

Legend
■ Freshmen
■ Sophomores
□ Juniors
□ Seniors
■ 5th Yr Undergrads
■ 1st Yr Graduates
■ 2nd Yr Graduates
□ 3+ Yr Graduates

Figure 1: Percentage of Teacher Loans by Academic Level for 1994-2007.

Interactions with the Teacher Cadet Program

In 2004, based on the data on participation and academic standing, the EOC recommended that freshmen not be granted loans unless they had participated in the Teacher Cadet Program. The recommendation was adopted by the General Assembly as part of the 2005-06 Appropriations Bill. A deeper analysis the following year of 286 of the 291 freshmen that received loans during the 2000-01 academic year found little difference in the long term participation rates of freshmen who had participated in the Teacher Cadet Program and those that had not. Of the 157 freshmen who had participated in the Teacher Cadet Program, 38 percent received a loan only during the freshmen year, while 44 percent of the freshmen who did not participate in the Teacher Cadet Program received a loan only during the freshmen year. As seniors, 42 percent of each group received a Teacher Loan. Thirteen percent of the participants in the Teacher Cadet Program did not receive a loan as sophomores, but received a loan in a subsequent year, compared to 16 percent of the non Teacher Cadet participants. Anecdotal feedback from teachers, guidance counselors, and parents indicated that freshmen who did not have access to or participate in the Teacher Cadet Program rely on the Teacher Loan Program to help them pursue a degree in education as much as students who have access to Teacher Cadet classes. The requirement that freshmen must have participated in the Teacher Cadet Program was removed from program participation requirements beginning with the 2006-07 academic year.

Teacher Cadets usually know that they want to be teachers when they enter college, and as Table 7 shows, an average of thirty-five percent of TLP applicants have been Teacher Cadets. The Center for Educator Recruitment, Retention, and Advancement of South Carolina (CERRA) coordinates the Teacher Cadet Program. As reported by CERRA, the mission of the Teacher Cadet Program "is to encourage academically talented or capable students who possess exemplary interpersonal and leadership skills to consider teaching as a career. An important secondary goal of the program is to provide these talented future community leaders with insights about teaching and school so that they will be civic advocates of education." Teacher Cadets must have at least a 3.0 average in a college preparatory curriculum, be recommended in writing by five teachers, and submit an essay on why they want to participate in the class. In 2002-03 the program was in 140 South Carolina high schools and enrolled 2,302 academically talented high school juniors and seniors. In 2003-04, 2,219 students were enrolled in Teacher Cadet in 134 schools. CERRA reported that for the 2004-05 school year they were able to recruit five new schools to the program, revive the program at eight additional schools, but lost the program at three schools due to staffing issues connected to budget constraints, leading to

a total of 159 classes in 144 schools. For the 2006-07 school year, 156 schools participated in the program and served 2,556 and the number should increase slightly in 2007-08. Overall, the Teacher Cadet program has been in over 169 high schools over the last four years, or about seventy-five percent of South Carolina public schools (CERRA, 2007). Of the 2,556 students served by the program in 2006-07, 39 percent indicated that they planned to become teachers.

Table 7
Distribution of Applicants to the Teacher Loan Program by Teacher Cadet Program Participation
1994-95 through 2006-07

Year	Number Applied	Teacher Cadets	%	Not Teacher Cadets	%	UNKN OWN	%
1994-95	2,242	761	34	1,348	60	133	6
1995-96	2,024	751	37	1,203	59	70	3
1996-97	1,446	537	37	864	60	45	3
1997-98	1,545	545	35	946	61	54	4
1998-99	1,569	577	37	939	60	53	3
1999-00	1,532	560	37	896	58	76	5
2000-01	2,028	685	34	1,245	61	98	5
2001-02	2,297	773	34	1,269	60	155	7
2002-03	2,004	727	36	1,209	60	68	3
2003-04	1,948	669	34	1,186	61	93	5
2004-05	1,735	567	33	1,051	60	117	7
2005-06	1,902	580	31	1,006	53	316	17
2006-07	2,033	695	34	1,269	62	69	3
TOTAL	24,305	8,427	35	14,531	60	1,347	6

Source: SC Student Loan Corporation, 1995-2007

Other factors continue to influence who applies for a Teacher Loan. Additional interviews with staff members of the Commission on Higher Education, former education majors and people familiar with college admissions and financial aid procedures, confirmed previous data that financial aid officers focus on finding students grant opportunities before pursuing loans. Obviously a grant of money is better for a student than taking out a loan, but by steering students away from the Teacher Loan Program, financial aid officers may be affecting the number of students who become teachers. Another factor affecting applications from enrolling freshmen is that many high school guidance counselors do not know about and/or do not tell graduating seniors about the Teacher Loan Program. More often than not, students learn about the Teacher Loan Program through the schools of education at their institutions of higher learning after they have started taking education classes.

One important factor with the potential to influence the application pool for the TLP is the economy and the budget situation of the institutions of higher learning. Applications increased thirteen percent from 2000-01 to 2001-02. The spring of 2001 saw a five percent budget cut by the state and the state supported institutions of higher learning raised their tuition. The increase came late in the financial planning process for many students and therefore, more students may have applied for the loans. The budget expectations and impending tuition increases were expected by students for the 2002-03 school year and the rate of applications returned to virtually the same rate as 2000-01. The number of applications in 2003-04 remained consistent with the previous year, followed by a drop in applicants in 2004-05, then rebounded to the previous level in 2005-06. The reasons for the drop are unknown, but applications have increased by 15.2 percent from 1735 in 2004-05 to 1998 in 2006-07. There was a five percent increase in applications between 2005-06 and 2006-07.

Interactions with State Scholarship Programs

Numerous scholarship programs have bee developed by the General Assembly to assist students in attending institutions of higher learning in South Carolina. In 1999, the General Assembly created the Teaching Fellows Program to recruit up to 200 high achieving high school seniors each year into teaching. Students who receive a Teaching Fellows award go through a rigorous selection process and are awarded up to $6000 per year as long as they continue to meet minimum criteria. Recipients agree to teach in South Carolina at least one year for each year they receive an award and they sign a promissory note that requires repayment of the scholarship should they not teach. In addition to being an award instead of a loan, the Teaching Fellows Program differs from the Teacher Loan Program in that recipients do not have to commit to teaching in a critical need subject or geographic area to receive the award. Research on the impact of the Teaching Fellows Program on the TLP was conducted for a previous report. Between 2000-01 and 2006-07, only 57 individuals have received both a Teaching Fellow Scholarship and a Teacher Loan. All but three recipients occurred in 2000 and 2001. Data indicate that the Teaching Fellows Program is having no impact on the TLP in regards to applications or receipt of loans. The impact may be minimal because Teaching Fellows are also eligible for Life Scholarships or Palmetto Fellow Scholarships.

An issue raised in the initial annual review in May 2002 was whether the other newly created scholarship programs for colleges and universities in the state were adversely affecting the TLP.

The other scholarship programs in question include the Palmetto Fellows Program, the Life Scholarships, and the Hope Scholarships.

The Palmetto Fellows Program and the Life Scholarships award students scholarships based on academic achievement, but neither has any direct connection to teacher recruitment. Palmetto Fellows meet rigorous selection criteria to receive an award of up to $6,700 per year, depending on available funding. Students can receive an award for up to eight semesters based on their initial college enrollment date and keep their awards as long as they maintain minimum requirements. Recipients of Life Scholarships, a program created in 1998, receive up to $5,000 per year, depending on available funding and tuition at the receiving institution. The $5,000 award includes $300 for books and $4,700 towards tuition. Students are eligible to receive a Life Scholarship if they meet two of three criteria: 1,100 or better on the SAT, a 3.00 grade point average, and/or rank in the top 30 percent of their graduating class. Students may not receive both a Palmetto Fellows and Life Scholarship at the same time. Hope Scholarships, created by the legislature in 2001, are presented to students who do not qualify for the Life Scholarships and may be used for the freshman year only. The Hope, Life and Palmetto Fellows scholarship programs were created with no direct connection to teacher recruitment.

Concern was raised in the 2002 report about whether these scholarship programs directed students away from the teaching profession. Working with the Commission on Higher Education, the Student Loan Corporation and the South Carolina Department of Education, specific data files from the three organizations were merged and cross-referenced to determine how the scholarship programs were interacting with the TLP and affecting the teaching pool. Table 8 shows the number of teachers in South Carolina over the last nine years who have participated in the Hope, Life, or Palmetto Fellows programs. The first class of graduates from the Teaching Fellows Program was in the spring of 2004. For the first time since this study began, recipients of the Hope Scholarship program who also received a teacher loan were identified as entering the classroom; five entered during 2006-07. The merged data found 1,306 recipients of the Life Scholarship teaching in South Carolina public schools in 2006-07 and 59 Palmetto Fellows recipients were teaching. Considering the short time the Life Scholarship program has been in place the number is impressive and encouraging. The Life Scholarships are awarded only to South Carolina high achieving students, thus the state is keeping some of its brightest students in state and they are entering the field of education.

Table 8

Loan Recipients serving in South Carolina schools in 2006-07 matched with the Scholarship file

	YEAR								
Scholarship Type	1998-99	99-2000	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
LIFE	11	93	227	370	533	701	898	1,069	1,306
Palmetto Fellows					2	10	27	39	59
Total	11	93	227	370	535	711	925	1,108	1,365

Source: Commission on Higher Education, 2007.

Another issue raised by the creation of the programs revolved around how many students in each program were majoring in education. Table 9 shows the number of scholarship recipients each year. It is a duplicated count and it should be remembered that students can lose and regain their scholarships based on academic performance.

Table 9

Number of Scholarship Recipients

Scholarship	1998	1999	2000	2001	2002	2003	2004	2005	2006	Total
Hope					2,085	2,325	2,344	2,449	2,408	9,203
LIFE	14,618	16,374	16,560	19,469	23,331	25,458	27,109	27,832	28,362	170,751
Palmetto Fellows				2,606	2,915	3,358	3,663	4,316	4,755	16,858
Total	14,618	16,374	16,560	22,075	28,331	31,141	33,116	34,597	35,525	232,332

Source: Commission on Higher Education, 2007.

Table 10
Percent of Students that Received Scholarships for each Fall Term
and had Declared an Education Major

Scholarship	1998	1999	2000	2001	2002	2003	2004	2005	2006	Average
Hope	0	0	0	0	14.3	13.9	13.2	15.1	14.7	14.2
LIFE	7.2	7.7	7.4	11	11.4	12.1	12.1	12.2	11.7	10.7
Palmetto Fellows	0	0	0	5.9	6.1	7.0	6.3	7.1	7.1	6.7
Total	7.2	7.7	7.4	10.4	11.1	11.7	11.5	11.7	11.3	10.5

Source: Commission on Higher Education, 2007.

In the first year of the Life Scholarships 7.2 percent of the recipients declared as education majors. Over the last five years the percentage of Life scholarship recipients declaring an Education major has grown and held steady at over 12 percent, though it fell to 11.7 percent, and for the life of the program the average is 10.7 percent of the recipients. The percentage of the first recipients of the Hope Scholarships was even greater at 14.3 percent, and over the five years of the program averaged 14.2 percent. The initial percentage of Palmetto Fellow recipients was 5.9 percent, with an average of 6.7 percent over the six years of the program. The number of student scholarship recipients majoring in education remains encouraging.

TLP Recipients and College Admission Scores

One positive trend about TLP loan recipients is evident: a significant increase in the average SAT score for loan recipients. As stated above, applicants for the TLP are required to have an SAT or ACT score equal to or greater than the SC average for the year of graduation from high school or the most recent year for which data are available. Concern over many of South Carolina's brightest students going to schools outside the state was one reason for the creation of the various scholarship programs; yet it was unknown whether the scholarships would adversely affect who applied and received loans through the TLP, specifically, would the SAT scores of TLP recipients increase, decrease or remain stagnant. As Table 11 shows, the average SAT score for TLP recipients has increased from slightly over 961 in 1998-99 to 1076.8 in 2006-07. This last average score is well above the national SAT average of 1017 for 2006-07. The SAT average for TLP recipients is in sharp contrast to the SAT scores for students indicating an interest in education as a college major. Scores for loan recipients on the ACT have not been reviewed, but should be for future reports. Perhaps the loan program is benefiting from the scholarship programs by keeping the better students in state; keeping them in state to work, and remain in the classroom over five years, will be a greater challenge.

Table 11

Average SAT Scores of Loan Recipients

ACAD_YR	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	Average
Aver SAT score	961.1	960.9	971.3	997.9	1024.1	1056.9	1069.6	1076.7	1076.8	1020.3

Repayment Patterns

The Teacher Loan Program allows recipients to cancel loans through teaching or repayment of the loan through monthly payments with interest. In the initial review of the TLP repayment data indicated that about half of the loan recipients repay their loan through monthly cash payments, more than 40 percent are canceling by fulfilling the teaching requirements, while about 10 percent of them are using a combination of teaching and monthly payments. These repayment patterns continued through the 2006-07 fiscal year.

Loan Recipients Who Serve Currently in SC Public Schools

After merging of the data files from Student Loan Corporation (SLC) and State Department of Education (SDE), 5,271 loan recipients between the years of 1994-95 and 2006-07 were

identified as serving in the South Carolina public school system in Spring 2007. Among the 5,271 individuals:

- 87.6 percent are female, 11.5 percent male and 0.9 percent are unknown.
- 84 percent are Caucasian, 13 percent African American, and 3 percent other/unknown.
- 37 percent were in the process of paying back the loan by teaching,
- 24 percent had cancelled their loans through teaching
- 37 percent had paid the loan back in cash or were in the process of repaying the loan
- 3 percent fell in a variety of other categories (loan consolidation, in deferment, etc.)
- Only two loans had been written off by SLC for lack of repayment.

Table 12
Loan Recipients in South Carolina Schools by Gender and Ethnicity

Gender	Number	Percent
Male	606	11.5
Female	4,615	87.6
Unknown	50	0.9
Ethnicity		
African American	669	12.7
Caucasian	4,419	83.8
Asian	9	0.2
Hispanic	24	0.5
American Indian	8	0.2
Unknown	142	2.7
Total	5,271	100.0

Over 1000 loan recipients who received loans prior to 1994-95 were still teaching in South Carolina public schools. The exact number is unknown because of a lack of sufficient data.

The following table presents areas of certification for the 5,271 loan recipients since 1994-95 who were serving in SC public schools as of 2006-07 school year. Just under 48 percent (2,520) are certified in elementary education, 6 percent (339) in mathematics, 11.1 percent (585) in early childhood education, 3.5 percent (184) in science, and about 9.5 percent (500) in special education. Nearly 94.9 percent (5,004 of 5,271) of the individuals' primary certification is as classroom teachers, child development or kindergarten teachers, or special education teachers. Primary certification as administrators comprised less than 0.3 percent (16 of 5,271) of loan recipients, guidance counselors 1.1 percent (58 of 5,271), media specialists just over 1.2 percent (64 of 5,271) and speech correctionists just under 2.3 percent (119 of 5,271). The vast majority of loan recipients since 1994-95 work in the classroom on a daily basis.

Table 13

Loan Recipients Serving in SC Public Schools as of 2006-07
Primary Area of Certification

Certification Code	Certification Subject	Number certified	Certification Code	Certification Subject	Number certified
AU	DRAFTING	1	20	SOCIAL STUDIES	131
AV	ELECTRICITY	2	21	HISTORY	4
GT	GIFTED AND TALENTED	0	25	GOVERNMENT	0
01	ELEMENTARY	2,520	26	PSYCHOLOGY	2
02	GENERIC SPEC. EDUC.	151	29	IND. TECH. EDUC.	5
03	SPEECH CORRECTIONIST	119	30	AGRICULTURE	4
04	ENGLISH	270	32	DISTRIBUTIVE ED.	2
05	FRENCH	29	35	FAMILY AND CONSUMER	7
06	LATIN	2	36	INDUSTRIAL ARTS	0
07	SPANISH	59	40	OFFICE OCCUPATIONS	1
08	GERMAN	3	46	DATA INFO. PROCESS	1
1A	MID. SCH. LANG. ARTS	1	46	BUSINESS EDUCATION	42
1C	MID. SCHOOL SCIENCE	2	4B	BUS/MARK/COMP. TECH	13
1D	MID. SCH. SOC. STU.	5	50	ART	86
1E	MID. LEVEL LANG. ARTS	21	51	MUSIC ED. CHORAL	41
1F	MID. LEVEL MATH.	13	52	MUSIC ED. PIANO	0
1G	MID. LEVEL SCIENCE	6	53	MUSIC ED. VOICE	2
1H	MIDDLE LEVEL SS	27	54	MUSIC ED. INSTRUMENT	32
10	MATHEMATICS	339	57	SPEECH & DRAMA	2
11	GENERAL MATHEMATICS	4	58	DANCE	5
12	SCIENCE	121	59	MUSIC ED. VIOLIN	0
13	GENERAL SCIENCE	12	60	MEDIA SPECIALIST	64
14	BIOLOGY	40	63	DRIVER TRAINING	6
15	CHEMISTRY	9	64	HEALTH	1
16	PHYSICS	2	67	PHYSICAL EDUCATION	37
2A	SP/ED ED. MEN. RET	100	69	SCHOOL PSYCH I	0
2B	SP/ED VIS. HAND.	2	70	SUPERINTENDENT	1
2C	SP/ED. TR. MEN. RET	2	71	PRINCIPAL – ELEM.	12
2D	SP/ED. HEARING HAND.	3	72	PRINCIPAL - HIGH.	1
2E	SP/ED. EMOT. HAND.	70	73	ELEM. SUPERVISOR	0
2F	SP/ED.ORTH. HAND.	1	74	SEC. SUPERVISOR	0
2G	LEARNING DISABIL.	129	80	READING TEACHER	1
2H	SP/ED. MENT DISABIL.	22	82	READING COORDINATOR	1
2I	SP/ED. MUL. CAT.	17	84	SCHOOL PSYCH. II	4
2J	SP/ED. SEV. DISABIL.	4	85	EARLY CHILDHOOD ED	585
5C	THEATER	2	86	GUID. COUN. – ELEM.	45
7A	ADMINISTRATOR	0	89	GUIDANCE - SECOND	13
	UNKNOWN	8	TOTAL		5,271

Table 14
Loan Recipients Serving in SC Public Schools as of 2006-07
Positions

Position Code	Position	Number
1	PRINCIPAL	36
2	ASST. PRIN., CO-PRIN., CURR. COORD.	106
3	SPECIAL EDUC. (ITINERANT)	13
4	CHILD DEVELOPMENT	79
5	KINDERGARTEN	214
6	SPECIAL EDUC. (SELF-CONTAINED)	339
7	SPECIAL EDUC. (RESOURCE)	351
8	CLASSROOM TEACHER	3,511
10	LIBRARIAN/MEDIA SPECIALIST	193
11	GUIDANCE COUNSELOR	121
12	OTHER PROFESSIONAL INSTRUCTIONAL-ORIENTED STAFF	59
15	COORDINATOR, JOB PLACEMENT	1
16	DIRECTOR, ADULT EDUCATION	1
17	SPEECH THERAPIST	120
19	TEMPORARY INSTRUCTIONAL-ORIENTED PERSONNEL	8
23	CAREER SPECIALIST	4
27	TECHNOLOGY/IT PERSONNEL	5
28	PERSONNEL DIRECTOR	3
29	OTHER PERSONNEL POSITIONS	2
33	DIRECTOR, TECHNOLOGY	2
35	COORDINATOR, FEDERAL PROJECTS	4
43	OTHER PROFESSIONAL NON-INSTR. STAFF	17
44	TEACHER SPECIALIST	8
46	CONTRACT TEACHER	1
48	ASSISTANT SUPERINTENDENT, NON-INSTRUCTION	1
53	DIRECTOR, INSTRUCTION	1
56	SUPERVISOR, ADULT EDUCATION	1
60	COORDINATOR, AP/G&T	1
65	ENGLISH COORDINATOR	1
74	SICENCE COORDINATOR	1
75	EDUCATIONAL EVALUATOR	1
78	SPECIAL EDUCATION COORDINATOR	6
80	SUPERVISOR, DISTRICT LIBRARY MEDIA SERVICES	1
82	EARLY CHILDHOOD COORDINATOR	2
84	COORDINATOR, ELEMENTARY EDUCATION	1
85	PSYCHOLOGIST	10
89	TITLE I, INSTRUCTIONAL PARAPROFESSIONALS	3
90	LIBRARY AIDE	1
91	CHILD DEVELOPMENT AIDE	1
93	SPECIAL EDUCATION AIDES	3
97	INSTRUCTIONAL COACH	33
99	OTHER COUNTY OFFICE/DISTRICT OFFICE STAFF	5
TOTAL		5,271

Table 14 indicates the actual position the 5,271 individuals who received loans between 1994-95 and 2006-07 were serving in the public schools. Almost 88 percent of the recipients were

involved in direct classroom instruction (4,624 of 5,271), with another 8 individuals serving as Teacher Specialists. Almost 6 percent of the individuals were serving as building level administrators, and 5.4 percent were media specialists or guidance counselors.

Career Changer Program

As stated earlier, the Career Changers program was established in 2000 to assist individuals who want to become teachers and already have a bachelor's degree and work experience. The program has not been reviewed until now because there were little data on which to review the program. Table 15 contains the recipient data by gender. The applicant and recipient data are similar to the TLP data in that the vast majority of recipients are white females, though the ratios fluctuate more from year to year than the rates in the TLP.

Table 15
Career Changer Recipients by Gender, 2000-07

Year	Recipient Number	Gender					
		Male		Female		Unknown	
		#	%	#	%	#	%
2000-01	37	4	11	33	89	0	0
2001-02	120	25	21	94	78	1	<1
2002-03	109	21	19	81	74	7	6
2003-04	111	16	14	87	78	8	7
2004-05	145	28	19	116	80	1	<1
2005-06	100	12	12	76	76	12	12
2006-07	96	12	13	71	74	13	13
TOTAL	718	118	16	558	78	42	6

Source: SC Student Loan Corporation, 2000- 2007.

Table 16
Career Changer Recipients by Race, 2000-07

Year	Recipient Number	Race							
		White		A-A		Other		Unknown	
		#	%	#	%	#	%	#	%
2000-01	37	29	78	6	16	1	3	1	3
2001-02	120	89	74	23	19	2	2	6	5
2002-03	109	87	80	13	12	0	0	9	8
2003-04	111	73	66	26	23	2	2	10	9
2004-05	145	121	84	18	12	2	1	4	3
2005-06	100	77	77	17	17	1	1	5	5
2006-07	96	70	73	20	21	1	1	5	5
TOTAL	718	546	76	123	17	9	1	40	6

*Source: SC Student Loan Corporation, 2000- 2007.*

An analysis of the data from the program reveals that 431 Career Changer recipients have reached cancellation or repayment status. Of those individuals, 197 are presently teaching and

having their loans cancelled, 99 have had their loans completely cancelled through teaching and 16 individuals have taught but are not presently teaching. One hundred three individuals are in the process of repaying their loans and 14 have completed repayment. Thus, 73 percent of the Career Changers receiving loans have entered teaching in a critical need area or school. It is unclear how many of the 80 individuals repaying the loans may be teaching but are not eligible for cancellation, or how many individuals are repaying the loans because they did not finish the program.

Goals and Objectives for the TLP

In 2003, the EIA and Improvement Mechanisms Subcommittee of the Education Oversight Committee requested that staff develop goals and objectives for the TLP to be recommended to the General Assembly. An advisory committee on the TLP was formed with representatives from CERRA, the Student Loan Corporation, the Division of Educator Quality and Leadership at the State Department of Education, and the Commission on Higher Education. After review of the data, the advisory committee recommended the following three goals and objectives for the Teacher Loan Program in 2004. The goals and objectives presented below were reconfirmed in 2005 and 2006 and remain the recommendation of the advisory committee.

1. The percentage of African-American applicants and recipients of the TLP should mirror the percentage of African-Americans in the South Carolina teaching force (presently 17 percent).

Percentage of African-American Applicants, 1994-2007
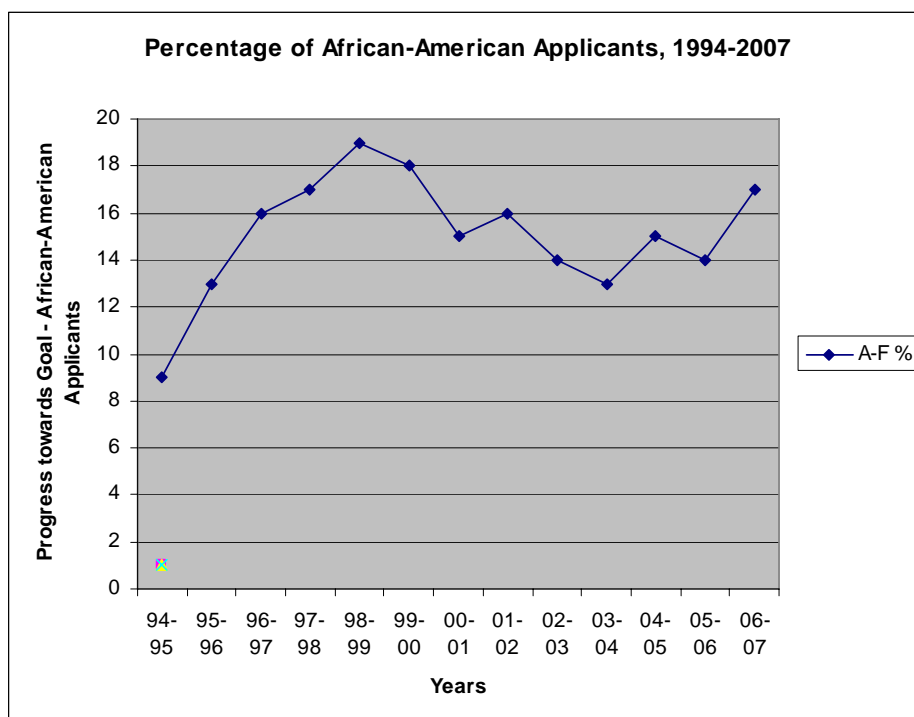
- By Fiscal Year 2009, the percentage of African-American applicants and recipients of the TLP will mirror the percentage of African-Americans in the South Carolina teaching force.

2. The percentage of male applicants and recipients of the TLP should mirror the percentage of males in the South Carolina teaching force (presently 17 percent).

Percentage of Male Applicants, 1994-2007
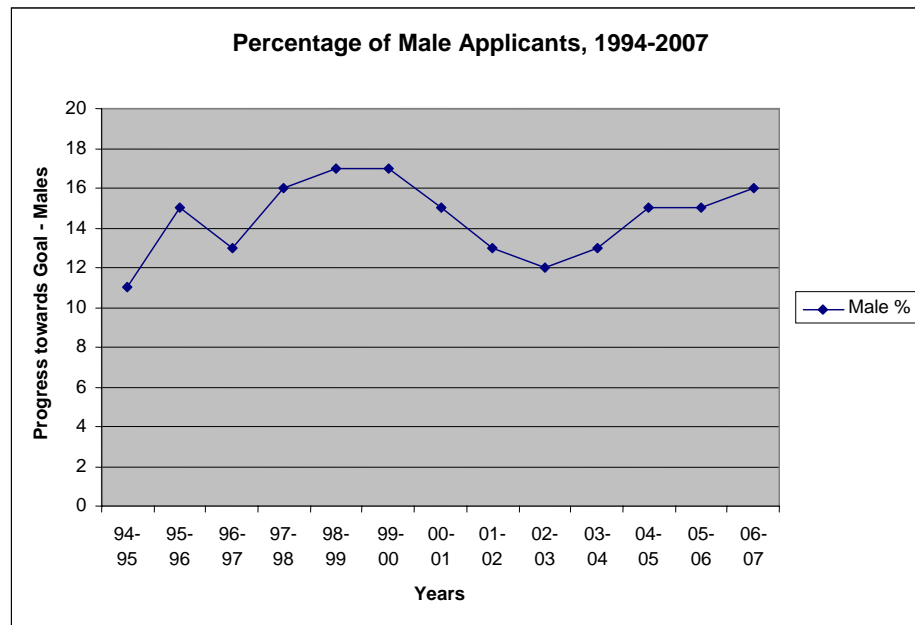
- By Fiscal Year 2009, the percentage of male applicants and recipients of the TLP will mirror the percentage of males in the South Carolina teaching force.

3. Eighty percent of the individuals receiving loans each year under the TLP should enter the South Carolina teaching force (presently 78 percent).
   - By Fiscal Year 2009, the percentage of TLP recipients entering the South Carolina teaching force will be 80 percent.

The advisory committee believed that these goals and objectives were reasonable and obtainable, though a significant challenge to the achievement of the goals is there is no entity in charge of seeing that the goals are reached. At present no goal is set for the percentage of recipients who choose to cancel their loans by teaching in a critical need or critical geographic area. Data on the effects of the new critical geographic area definition is needed to establish a well-informed goal.

<u>**Future Studies**</u>

During the 2006-07 fiscal year, the EIA Subcommittee of the Education Oversight Committee approved a three year study cycle on continuing reports prepared by the staff of the EOC. Every third year a continuing report will address substantive questions in addition to an update on the program under review. The reports issued on the TLP in 2006 and 2007 presented an update on the basic data relevant to the program. For the 2007-08 report, the advisory committee identified five issues for deeper analysis in addition to an update on the program data.

- How is the TLP marketed in the 30 institutions of higher learning that offer a teacher preparation program.
- Why are there so few African American applicants and recipients of the loan program?
- Why do so few sophomores take advantage of the program?
- How does the TLP compare to similar programs offered by 43 states across the nation?
- Should the loan be available to teachers seeking master's degrees in the field in which they are already certified?

Information on the first three issues would be collected via email surveys with programs participants and/or financial aid officers at the teacher preparation institutions. A review of literature and information gathered from the 43 other teacher loan programs will be analyzed for possible recommendations regarding changes to the overall program and whether teachers seeking master's degrees in their present field should be included in the program in the future.

<div align="center"><u>**Findings and Recommendations**</u></div>

<u>**Findings From Previous Reports Reconfirmed**</u>

- The Teacher Loan Program continues to fulfill the statutory mission to attract individuals into the teaching profession and into areas of critical need.
- Both African-Americans and males remain underrepresented in applications and reception of loans compared to the percentage of each group in the teaching force.
- The sharing of information among the various agencies involved with the program continues to improve.
- The scholarship programs established by the General Assembly have not negatively impacted on the TLP.
- There has been a significant increase in the average SAT score of TLP recipients between 1998-99 and 2006-07.
- There is a significant decrease in the number of sophomores participating in the program compared to freshman participation.

- The Career Changers Program is contributing to the number of teachers in the workforce.
- There is no program governance and administrative organization.
- There is inadequate communication in multiple areas associated with the program, including the meaning of cancellation and how recipients get the loan canceled.
- The mission of the program needs to be reviewed and possible structural changes recommended to the General Assembly.
- Students participating in the Teaching Fellows Program are not receiving additional state assistance from the Teacher Loan Program.
- There have been no major changes in the patterns in the statistical data regarding the gender and ethnicity of the applicant pool or the recipients of loans, percentage of loans going to Teacher Cadets, SAT scores, repayment patterns, or the primary certification area of loan recipients.

New Findings from the 2006-07 Report
- There has been a 15.2 percent increase in the number of individuals applying for a Teacher Loan over the past two academic years.
- There has been a steady increase in the number of schools qualifying as critical geographic area schools over the last two years.

Recommendations
1. A Policy Board of Governance should be established, or an existing state agency should be identified as the central authority of the program, with the responsibility to set goals, facilitate communication among the cooperating agencies, advocate for the loan participants and effectively market the Teacher Loan Program. (At the end of the 2007 session of the General Assembly, H3162, a bill to create a Policy Board for the TLP, had passed the House and awaits consideration by the Senate Education Committee).
2. The goals and objectives beginning on page 24 of this report established by the multi-agency advisory committee should be adopted by the Education Oversight Committee as the evaluation standards and objectives for the program.
3. The impact of the increase of qualifying schools on the definition of critical geographic need should be studied over time.

Appendix

<u>**Findings from Previous Reviews**</u>

The initial review of the program covering the years 1984-2001 was issued in May 2002 and covered four areas: (1) described the program historically; (2) described the applicant and recipient populations; (3) examined the repayment patterns; and (4) examined the degree to which teacher loan recipients are represented in SC's active teaching force.

Findings from the initial reviewed included: 1) the Teacher Loan Program is fulfilling the statutory mission to attract individuals into the teaching profession and into areas of critical need; 2) the Student Loan Corporation has managed the program and the assets of the program well; 3) approximately half of the loan recipients teach at least a minimum number of years to repay the loans; 4) the number of areas of critical need has increased since the inception of the program; 5) the vast majority of loan recipients are white females; and, 6) the collection of and sharing of data among the various partners in the program could be improved. Recommendations from 2002 included: 1) there needs to be better communication and sharing of data among the various partners of the program; 2) additional data on why individuals who receive the loans but do not teach need to be collected; 3) vigorous recruitment of African-Americans and males into the program is needed; and, 4) the impact on the program from South Carolina's multiple scholarship options needs to be studied.

Prior to the completion of the review for the 2001-02 school year the study was expanded to include the 2002-03 school year and move the report date from May to September in an effort to bring the review in line with the budget development process. The second report focused on: (1) a statistical comparison of the two fiscal years to previous years; (2) the connection between recipients of the TLP and the various scholarship programs sponsored by the State of South Carolina; and (3) an evaluation of how the TLP could contribute to the technical assistance programs that are part of the Accountability System.

New findings from 2003 report included: 1) The sharing of information among the various agencies involved with the TLP has improved; 2) the scholarship programs established by the General Assembly have not negatively impacted the TLP; and, 3) there was a significant increase in the average SAT score of TLP applicants between 1998-99 and 2002-03. New recommendations from the report included: 1) the General Assembly should develop long range goals and objectives for the program; 2) the General Assembly should amend the enabling

legislation for the program to allow the program to assist teachers in obtaining advanced degrees in exchange for service in critical geographic need schools; 3) service in Unsatisfactory and Below Average schools should not become a classification for designation of critical geographic need schools; and, 4) the movement of teachers educated with funds from the TLP from school to school should be studied to determine if the program has an impact on providing long term solutions to critical geographic need schools.

The EIA and Improvement Mechanisms Subcommittee of the Education Oversight Committee (EOC), in response to the report released in 2003, requested the staff of the EOC to develop goals and objectives for the TLP for submission to the legislature for their consideration. The development of suggested goals and objectives were one aspect of the report released in 2004 for the 2003-04 academic year. Other topics addressed in the report included: (1) a statistical comparison of the fiscal year to previous years; (2) an analysis of the movement patterns of teachers that received loans during the period of cancellation and after the loan was cancelled; and (3) and an assessment of the issues and challenges for the TLP.

New findings from the 2004 included: 1) the maximum amount of the TLP loan no longer meets the financial needs of the prospective education major; 2) African-Americans and males are both underrepresented in applications and reception of loans compared to the percentage of each group in the teaching force; 3) there is a significant decrease in the number of sophomores participating in the program compared to freshman participation; and 4) the Career Changers Program is contributing to the number of teachers in the work force. New recommendations from the report included: 1) The goals and objectives presented in the report should be adopted by the General Assembly as the official goals and objectives of the program; 2) to achieve the goals and objectives for the program, a marketing program should be established at CERRA; 3) freshmen should be excluded from the loan program unless the applicant participated in the Teacher Cadet program; 4) the amount a student can borrow each year and cumulative for the program should be increased; and, 5) the amount of funding for the program should be increased in order to raise the amounts students can borrow each year and cumulative.

The primary focus of the 2004-05 annual report was on why individuals were repaying the loans instead of canceling the loans. The South Carolina Educational Policy Center (SCEPC) in the College of Education at the University of South Carolina conducted research on behalf of the EOC on why individuals repaid the loans instead of canceling the loans. SCEPC surveyed over

600 individuals identified by the SLC as repaying the loan and about 50 percent of the individuals sent a survey returned the survey. The survey results found that a number of the loan recipients decided that teaching was not their profession of choice, thus, those individuals were repaying the loan. Of greater importance, however, was the finding that many of the respondents were teaching and were eligible for cancellation but were, for a number of reasons, repaying the loans. The SCEPC determined that there were a number of communication issues leading to: confusion on the part of recipients over how to cancel the loan; confusion over who was eligible for cancellation; and a lack of institutional control over program administration. The SCEPC recommended that: a Policy Board of Governance should be established, or an existing state agency involved with the program, should be identified as the central authority of the program, with the responsibility to set goals, facilitate communication among the cooperating agencies, advocate for the loan participants and effectively market the Teacher Loan Program. The EIA Subcommittee of the EOC endorsed, and the full EOC adopted the recommendation. The recommendation was forwarded to the legislature but was not adopted during the 2006 nor 2007 session. As part of their budget request for 2006-07, the Commission on Higher Education requested $50,000 to manage the policy board if it were created. Presently, H3162 has passed the House and awaits consideration by the Senate Education Committee.

The 2005 report also recommended research into the impact of the Teaching Fellows Program on the TLP and the adoption of the goals for the TLP outlined in the 2004 report. The Teaching Fellows Program was found to have little or no impact on the TLP as reported in the 2006-07 report, which was essentially a statistical update on the program for the 2005-06 academic year. To facilitate future data collections, it was proposed that future reports on the TLP operate on a three year cycle, with two years focusing on statistical updates and the third year incorporating a more significant research question. The recommendation was adopted by the EIA Subcommittee and was implemented with the 2006-07 report.

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South Carolina Department of Education, PCS files, 2000-2007, Unpublished.

South Carolina Student Loan Cooperation, "Teacher Loan Program Annual Reports, 1985/86 – 2006/07," Unpublished.

EDUCATION OVERSIGHT COMMITTEE

Subcommittee: <u>EIA and Improvement Mechanisms</u>

Date: <u>October 8, 2007</u>

REPORT/RECOMMENDATION
Report from the Teacher Recruitment and Retention Task Force

PURPOSE/AUTHORITY
As part of the 2006-07 Fiscal year budget, the General Assembly adopted Proviso 1A.66 , which reads: Proviso 1A.66. (SDE-EIA: Teacher Recruitment/Retention Task Force) The Education Oversight Committee shall convene a task force to evaluate current teacher recruitment and retention policies, particularly those that impact on schools that have historically underachieved. Included in the task force will be representatives from the Department of Education, the Center for Educator Recruitment, Retention, and Advancement (CERRA-South Carolina), institutions of higher learning, the Student Loan Corporation, the Commission on Higher Education, and classroom teachers from throughout South Carolina. This is the report from the task force.

CRITICAL FACTS

TIMELINE/REVIEW PROCESS
Study began in fall 2006, completed in September 2007.

ECONOMIC IMPACT

    Cost: Fiscal impact not calculated

    Fund/Source:

ACTION REQUEST

☐ **For approval**　　　　　　　　☒ **For information**

ACTION TAKEN

☐ **Approved**　　　　　　　　☐ **Amended**

☐ **Not Approved**　　　　　　　　☐ **Action deferred (explain)**

2007-2008

REPORT FROM THE TEACHER RECRUITMENT & RETENTION TASK FORCE

Report from the Teacher Recruitment and Retention Task Force
Executive Summary

As part of the 2007 fiscal year budget, the General Assembly adopted Proviso 1A.66 , which reads:

> **Proviso 1A.66.** (SDE-EIA: Teacher Recruitment/Retention Task Force) The Education Oversight Committee shall convene a task force to evaluate current teacher recruitment and retention policies, particularly those that impact on schools that have historically underachieved. Included in the task force will be representatives from the Department of Education, the Center for Educator Recruitment, Retention, and Advancement (CERRA-South Carolina), institutions of higher learning, the Student Loan Corporation, the Commission on Higher Education, and classroom teachers from throughout South Carolina.

Pursuant to the proviso, a Teacher Recruitment and Retention Task Force was created. The task force met four times over the space of eight months and analyzed a myriad of reports and data on national and South Carolina teacher recruitment and retention programs and trends. At present, there are several effective teacher recruitment and retention programs in South Carolina, including the Teacher Loan Program, the Teaching Fellows Program, PACE, Teacher Cadet, Troops to Teachers, and the National Board Certification program. Despite the efforts of these programs, teacher turnover occurs at an undesirable rate, with one-third of South Carolina new teachers leaving within the first five years of entering the profession. Too, South Carolina's 30 teacher preparation institutions are not graduating enough individuals to supply the state's needs, now or in the future. To address the needs of the state, the task force made the following recommendations:

- A data collection system similar to the one implemented in Virginia should be developed or purchased and adapted for South Carolina to collect more accurate and definitive data on teacher recruitment and retention for research and development of policy in the future.

- The South Carolina Induction and Mentoring Program: Implementation Guidelines should be fully funded in 2008-09, including stipends for mentors, to strengthen district leadership and provide for the effective mentoring of beginning teachers.

- Marketing of the teacher recruitment and retention programs that presently exist in South Carolina should be expanded through the responsible agency or sponsoring institution to increase the awareness and effectiveness of these programs, especially in the recruitment of males and African Americans.

- The presidents and provosts of the teacher preparation institutions, with the assistance of the Commission on Higher Education, should convene and collaborate on a comprehensive plan to recruit the best and brightest individuals into the teacher preparation programs and increase the number of graduates prepared to teach in South Carolina schools.

- A study on teacher compensation, to include examination of innovative ways to increase compensation for teachers beyond traditional salary, should be conducted by the State Budget and Control Office.

Report from the Teacher Recruitment and Retention Task Force

The issue of teacher recruitment and retention has been of concern in South Carolina and the rest of the United States for many years. Many factors influence the ongoing battle to recruit and retain quality teachers, a battle that has many fronts. Statistics gathered by the Commission on Teaching and America's Future and the United States Department of Education indicate that up to 50 percent of new teachers leave the profession within five years of entrance. Mathematics, science, and special education positions go unfilled every year as the number of vacancies exceeds the number of qualified candidates available to fill them. Looming on the horizon in the next 5-10 years is the retirement of many veteran teachers.

With these factors in mind, the General Assembly adopted Proviso 1A.66 , which reads:

Proviso 1A.66. (SDE-EIA: Teacher Recruitment/Retention Task Force) The Education Oversight Committee shall convene a task force to evaluate current teacher recruitment and retention policies, particularly those that impact on schools that have historically underachieved. Included in the task force will be representatives from the Department of Education, the Center for Educator Recruitment, Retention, and Advancement (CERRA-South Carolina), institutions of higher learning, the Student Loan Corporation, the Commission on Higher Education, and classroom teachers from throughout South Carolina.

Pursuant to the proviso, a Teacher Recruitment and Retention Task Force was created. The Task Force, which includes representatives from the Department of Education, the Center for Educator Recruitment, Retention, and Advancement (CERRA-South Carolina), institutions of higher learning, the Student Loan Corporation, the Commission on Higher Education, the South Carolina Independent Colleges and Universities, and the Personnel Director's Division of the South Carolina Association of School Administrators, also includes thirteen educators from around the state. The educators represent classroom teachers and administrators (see Appendix A for a list of task force members). The Task Force first met in February, then again in June, August, and September.

Review of Existing Literature
There have been many studies of the various issues affecting teacher recruitment and retention. The issue is very complex; as evidenced by the diversity of viewpoints/findings regarding the topics within teacher recruitment and retention, which include teacher pre-service preparation, compensation packages, working conditions, recruitment and retention incentive programs, and mentoring and induction programs. The short literature review below is but the proverbial "tip of the iceberg" of literature that has been produced over the last five years regarding the different aspects of teacher recruitment and retention.

Educating School Teachers, by Arthur Levine (2006), looked at the teacher preparation portion of teacher recruitment. In the study Levine found: 1) that many teacher candidates receive inadequate preparation, especially in being able to cope with today's classrooms; 2) that the curriculum presented teacher candidates is in disarray; 3) that the faculty in teacher preparation programs are disconnected from the very schools they are preparing teachers for; 4) that schools of education have low admission standards; 5) that there is little quality control from within and from outside the teacher preparation programs; 6) that there are disparities in institutional quality; and, 7) that there is "a significant relationship between the type of university a teacher attended and their students' achievement growth." Levine offered five recommendations for change: 1) transform education schools from ivory towers into

professional schools focused on school practice; 2) focus on student achievement as the primary measure of teacher education program success; 3) rebuild teacher education programs around the skills and knowledge that promote classroom learning; make five-year teacher education programs the norm; 4) establish effective mechanisms for teacher education quality control; and, 5) close failing teacher education programs, strengthen promising programs and expand excellent programs by creating incentives for outstanding students and career changers to enter teacher education at doctoral universities. Response to Levine's work was mixed, with the American Association of Colleges for Teacher Education (AACTE) stating "In particular, we challenge the need to start from scratch to create quality control and accountability. Further, we take exception to the elitism implicit in the proposal to expand programs at highly selective institutions, rather than to bolster those that prepare a majority of the nation's teachers." Whether one agrees with Levine or not, inadequate teacher preparation is often cited for the high teacher attrition rate for new teachers.

Another recent report, *Teachers and the Uncertain American Future*, issued by the Center for Innovative Thought sponsored by the CollegeBoard (2006), addressed the "perfect storm" that is brewing over teacher recruitment in general. The report cited many alarming statistics on teacher preparation, recruitment and retention and charged that the nation's citizens, business leaders, and politicians refuse to see the storm's approach. Included in the statistics was the statement that teachers in K-12 are among the lowest paid professions at the entry level, and that it is common for teachers with 5-10 years experience to still be making less than recent graduates entering other careers. The report urged an increase in teacher compensation, 15-20 percent now and by 50 percent in the near future, to be funded partially through a "Teachers' Trust" funded by the federal and state governments and the private sector. Other recommendations encouraged making teaching a "preferred profession," creating multiple pathways into teaching, and closing the diversity gap that exists in the teaching profession with new and stronger incentive programs.

One area of teacher recruitment and retention under greater scrutiny today is the incentive programs offered by the various states and school districts to attract and retain teachers. A recent article in *Education Week*, "Teacher-Pay Incentives Popular but Unproven" (September 27, 2006), stated that there is little research that shows that incentives provide the results intended. *The New York Times* published an article on incentives on August 27, 2007 titled "With Turnover High, Schools Fight for Teachers." The article highlighted the importance of incentives to recruit teachers in Guilford County, North Carolina, New York, Los Angeles, Kansas, and Chicago. Guilford County was offering bonuses of up to $10,000, depending on the school and certification area. New York was offering a housing incentive of up to $5,000 for a home down payment. Most incentive programs have not been around long enough to analyze the impact they have on teacher recruitment or the retention rates of the teachers recruited. Long term data is needed on the various incentive programs to determine their effectiveness in recruiting and retaining teachers. Incentive programs also do not always attract the best teachers to the schools needing the most help. Frequently the reasons that individuals seeking teaching positions do not locate in a particular locality have less to do with salary, and more to do with quality of life issues such as affordable or available housing, proximity to shopping malls, movie theaters and hospitals. These issues are often more important than salary, and cannot be offset easily by bonuses or higher salaries.

A fourth area of research on teacher recruitment and retention focuses on working conditions. While many studies highlight the importance of adequate preparation of pre-service teachers, other studies point to the importance of having a strong mentoring program for new teachers in place. Having adequate support at the beginning of one's career is only one working condition affecting teacher retention. A study of the working conditions conducted in South Carolina in

2004 and issued in 2005 found that the two most important factors affecting working conditions in the state were collegiality among the faculty and staff and administrative support. Adequate materials, well-maintained buildings, and personal safety were other working conditions cited as frustrations to teachers.

Another study with South Carolina ties was *Rural Teacher Recruitment and Retention Practices: A Review of Literature, National Survey of Rural Superintendents, and Case Studies of Programs in Virginia*, released in December 2005 by Edvantia. The study identified four challenges related to recruiting and retaining teachers in rural areas: 1) lower pay; 2) geographic and social isolation; 3) difficult working conditions, such as having to teach classes in multiple subject areas; and 4) NCLB requirements for highly qualified teachers. The study identified five strategies currently being used to address the challenges: 1) grow-your-own initiatives; 2) targeted incentives; 3) improved recruitment and hiring practices; 4) improved school-level support for teachers; and 5) use of interactive technologies. While the study stated that these practices can make a difference, additional strategies were suggested, including: 1) collecting state and local data on teacher supply and demand; 2) basing recruitment efforts on data analysis; 3) involving the community in welcoming new teachers; 4) investing in leadership development; and 5) evaluating recruitment efforts often. The study had a direct connection to South Carolina: one grow-your-own program studied in Virginia - "Teachers for Tomorrow" - was patterned after South Carolina's Teacher Cadet Program. The two other case studies conducted for the report focused on "Career Switcher Programs" (in South Carolina called Career Changers and PACE) and Mentoring Programs (also present in South Carolina as part of the Induction program).

Cassandra M. Guarino, Lucrecia Santibanez, and Glenn M. Daley (2006) conducted a study that reviewed the recent literature on teacher recruitment and retention. The authors developed the conceptual framework of their study from the economic labor market theory of supply and demand. They reviewed thousands of studies conducted since 1980 on teacher recruitment and retention, focusing on articles that used teacher labor market data that included data from 1990 or later, were empirical in nature (offered evidence rather than opinion, theory or principles), were of high quality, and were published in scholarly journals. The study provided data on the following six areas: 1) the characteristics of individuals who enter teaching; 2) the characteristics of individuals who remain in teaching; 3) the external characteristics of schools and districts that affect recruitment and retention; 4) compensation policies that affect recruitment and retention; 5) pre-service policies that affect recruitment and retention; and 6) in-service policies that affect recruitment and retention.

The summary of their findings represents the overall trends regarding research on teacher recruitment and retention and are listed below.

1) The characteristics of individuals who enter the teaching profession:
- Females form a greater proportion of new teachers than males.
- Whites form a greater proportion of new teachers than minorities.
- College graduates with higher measured academic ability were less likely to enter teaching than were other college students. It is possible that the difference in measured ability was driven by elementary teachers, who represent a majority of teachers.
- An altruistic desire to serve society is one of the primary motivations for pursuing teaching.

2) The characteristics of individuals who leave the teaching profession:
- The highest turnover and attrition rates for teachers occur in their first years of teaching and after many years of teaching when nearing or reaching retirement, producing a U-shaped pattern of attrition with respect to age and/or experience.
- Minority teachers tend to have lower attrition rates than white teachers.
- Teachers in the fields of science and mathematics were more likely to leave the profession than teachers in other fields.
- Teachers with higher measured academic ability (as measured by test scores, such as SAT, ACT, Praxis I, Praxis II, etc.) were more likely to leave the profession.
- Female teachers have higher attrition rates than males.

3) External characteristics of schools and districts that are related to teacher recruitment and retention rates:
- Schools with higher proportions of minority, low-income, and low-performing students tend to have higher attrition rates.
- Urban school districts have higher attrition rates than suburban and rural districts.
- Teacher retention is usually higher in public than in private schools.

4) Findings regarding compensation policies and their relationship to teacher recruitment and retention:
- Higher salaries are associated with lower attrition rates.
- Teachers are responsive to salaries outside of their districts and the profession.
- Dissatisfaction with salary was associated with higher attrition and decreased commitment to teaching according to teachers responding to surveys.

5) The impact of pre-service policies on teacher recruitment and retention:
- Graduates or completers of nontraditional and alternative teacher education programs appear to have higher rates of retention in teaching than national comparison groups and often differ from traditional recruits in their background characteristics.
- There is some evidence that streamlined routes for credentialing or certification provide more incentive to enter teaching than monetary awards.
- Pre-service testing requirements may adversely affect the entry of minority candidates into teaching.

6) The impact of in-service policies on teacher recruitment and retention:
- Schools that provided mentoring and induction programs, especially those related to collegial support, have lower turnover rates among beginning teachers.
- Schools that provide teachers with more autonomy and administrative support have lower levels of teacher attrition and migration.
- Accountability policies might lead to increased attrition in low-performing schools.

The authors of the study summarized their findings by saying:

> The entry, mobility, and attrition patterns summarized above indicate that teachers exhibit preferences for higher salaries, better working conditions, greater intrinsic awards and tend to move to other teaching positions or to jobs or activities outside teaching that offer these characteristics when possible. In particular, the finding that higher compensation is associated with increased retention is well established. These findings lend support to the theory. . . that the recruitment and retention of teachers depends on the attractiveness of the teaching profession relative to the alternative opportunities available. The relative attractiveness of teaching depends on the notion of relative "total compensation"

– a comparison of all rewards stemming from teaching, extrinsic and intrinsic, with the rewards of other possible activities that could be pursued.

The literature reviewed above is but a microcosm of the reports and studies completed on teacher recruitment and retention over the last ten years. One common theme in all of the literature is that there are no "quick fixes" or solutions to the teacher recruitment and retention situation. The issues presented are relevant in many ways to South Carolina and to the work of this task force.

Teacher Turnover and Vacancy Data in South Carolina

Teacher turnover and vacancy information is collected each year by the Center for Educator Recruitment, Retention, and Advancement (CERRA). CERRA is located at Winthrop University and works cooperatively with other organizations and the various school districts to provide leadership in identifying, attracting, placing, and retaining well-qualified individuals for the teaching profession. CERRA maintains the South Carolina Teacher Application System, a common internet based application program for the state, and since 1989, has held teacher exposition for participating districts, which over the last three years has led to the direct hiring of almost 400 teachers. The statistical data gathered by CERRA on the vacancies in the various districts, the Department of Juvenile Justice, and the SC School for the Deaf and the Blind each year is used to help identify the critical needs certification areas for application by the Teacher Loan Program, as well as monitor areas where recruitment efforts need additional attention.

Data collected by CERRA in the 2006-07 Fall Teacher/Administrator Supply and Demand Survey showed that 8,101 teachers were hired by the various districts in South Carolina. This number includes teachers changing districts and individuals hired for the first time in South Carolina. The data also are collected by grade level and subject area certification, and the source of the new hire. Summary data for 2006-07 is in Table 1 and data from 2001-06 can be found at http://www.cerra.org/pr/publications.html under CERRA Supply and Demand Data.

Table 1
New Hires by Source – 2006-07

SOURCE	#	SOURCE	#
New Teacher Education Grad-In State	**2,113.5**	**From another District- In State**	**1,969.5**
New Teacher Education Grad-Out of St	**760**	**From Out of State (not to include anyone already New Teacher in Education Grad-Out of State)**	**1057**
Returning to Teaching-In State	**522**	**From Outside the United States**	**340**
Retired, Returning to Teaching	**691.5**	**List the state/countries from where new teachers hired:**	
PACE Program	**478**	ALL STATES (and DC) EXCEPT FOR VT and SD	
Other:	**183**	Countries/Territories: Australia, Canada, Chile, China, Colombia, Costa Rica, Ecuador, Guam, Haiti, India, Jamaica, Kenya, Korea, Philippines, Puerto Rico, Romania, South Africa, Spain, Trinidad, United Kingdom, Venezuela	
TOTAL: 8,114.5 (over counts by 13.5: 0.17%)			

Source: CERRA, 2006-07.

Several important points are evident from these data.

- Approximately 25 percent of the new hires were teachers leaving one school district for another.
- Only 26 percent of the new hires were new teachers trained in South Carolina teacher preparation programs.
- Including new teachers trained in teacher preparation programs in other states, 22 percent of the new hires were from out of state.
- Eight percent of the new hires were returning to the classroom after officially retiring.
- Four percent of the new hires were foreign nationals.

The data also indicate that presently South Carolina is not producing sufficient numbers of education graduates in its teacher preparation institutions to supply the state, as seen in the long term data presented in Table 2 (there are about 20,000 individuals who hold valid teaching certificates in South Carolina who, for a multitude of reasons, are not employed by a South Carolina school district). At present, over the last five years the state institutions are accounting for less than one-third of the new hires needed in the state each year.

Table 2 provides longitudinal information on sources of new hires, and the data for 2006-07 mirrors the data in previous years. Teacher turnover from district to district is between 22-24 percent, new hires from out of state make-up about 20-22 percent, new hires from South Carolina teacher preparation institutions encompass 26-30 percent, and eight percent are retirees returning to the classroom.

Table 2
New Hires by Source – 2001-07

	Number of New Teacher Hires and Percentages of Those Hires by Source									
	New SC Grads	**New Out-of-State Grads**	**Returning to Teaching**	**Retired Returning to Teaching**	**Retired Returning to Critical Needs Subject Area**	**Another District**	**Out-of-State**	**Other**	**Not Reported**	**Another Country**
2006	2,113.5 (26.1%)	760 (9.4%)	522 (6.4%)	691.5 (8.5%)		1,969.5 (24.3%)	1,057 (13.0%)	183 (2.3%)	0	340 (4.2%)
2005	2,235 (30.0%)	561 (7.5%)	520 (7.0%)	652.5 (8.8%)		1,688.3 (22.7%)	908 (12.25	492 ((6.6%)	388 ((5.2%)	NA
2004^	1,700 (26.2%)	450 (6.9%)	370 (5.7%)	137 (2.1%)	365.5 (5.6%)	1,582 (24.4%)	631 (9.7%)	335 (5.2%)	916.25 (14.1%)	NA
2003	1,536	450	286	102	414	976.5	441.4	214.5	408.5	NA
2002~	1,850	557	433	156	421.9	1,140	486	263.4	267.5	NA
2001	1,988	641	335.5	143	501.5	1,710.5	696	326	212	NA

^ Data from 83 systems ~ Includes two systems not previously surveyed (Dept. of Juvenile Justice and the SC School for the Deaf and the Blind) - accounted for 20 new hires. *Source: CERRA, 2006-07.*

Of equal importance to the source of new hires is the number of vacancies that still exist at the beginning of school. There were approximately 48,000 classroom teacher positions in 2006-07, 680.3 vacancies, or a rate of about 1.4 percent, were reported in the final supply and demand survey results in November 2006. Though not a large percentage overall, the vacancy rate varied by district, with some districts having no vacancies, and others having 20 or more. When student instruction and learning is addressed, however, even one unfilled position is too many, and the chances are good that when vacancies exist, high quality teachers are not present in every classroom. This number represents a 24 percent increase in the number of vacancies

from the 2005-06 school year, when there were 548.5 vacancies reported, and a 209 percent increase on the number of vacancies reported in 2001-02. In fact, since 2001-02, the number of vacancies reported by school districts, the Department of Juvenile Justice, and the SC School for the Deaf and the Blind, has steadily increased from 325.5 vacancies in 2001-02 to 680.3 in 2006-07. The statistics underscore the need for South Carolina to recruit, train, and retain, more teachers in the future.

Teacher Recruitment
Teacher recruitment actually occurs on two different dimensions. The first dimension is the recruitment of individuals into the profession as a whole, and the second dimension is the recruitment of teachers into specific districts or schools.

South Carolina has instituted a number of programs and initiatives to address the first dimension of teacher recruitment. Recruitment during this aspect often is viewed as getting high school juniors and seniors interested in the profession, then getting them to major in education at a college and university, with entry into the profession at the end of college. In reality, most high school students do not consider teaching as the career for them, and most college and university freshmen declare undecided as their major upon matriculation. South Carolina presently has several initiatives designed to recruit middle and high school students into the teaching ranks. They are:

- ProTeam/Freshman Academy
- Teacher Cadet Program
- Teacher Loan Program
- Teaching Fellows Program
- Call Me Mister
- Minority Recruitment

Recruitment of individuals into the profession does not end at the high school level or in the colleges and universities; there are several initiatives that focus on getting adults who are not of traditional college age or who are college graduates without an education background into the profession. They include:

- Program of Alternative Certification for Educators (PACE)
- American Board for the Certification of Teaching Excellence (ABCTE)
- Career Changers
- Troops to Teachers

CERRA coordinates the ProTeam/ Freshman Academy, Teacher Cadet and Teaching Fellows programs. Recruitment of individuals into the PACE and Career Changers is coordinated by the Division of Educator Quality and Leadership of the State Department of Education.

Each of the recruitment initiatives operating in South Carolina is successful in bringing individuals into the profession. ProTeam involved about 500 middle school students each year in learning about the profession. In March 2006, CERRA's Board of Directors decided to re-tool the ProTeam middle school program to meet the needs of ninth graders in the Freshman Academy models in South Carolina. Currently, this ninth grade pilot program is being utilized in five high schools in each of the CERRA regions. CERRA plans to expand the program into additional schools in the near future.

Many of those students who participated in ProTeam eventually ended up in the Teacher Cadet Program (TCP), a rigorous high school program that serves about 2,600 students academically-

able high school junior and seniors in 75 percent of the state's high schools each year. Piloted in four high schools in South Carolina in 1985-86, the TCP has grown to include approximately 155 South Carolina high schools. At the end of 2006-07, 39,036 individuals had completed the program. The honors level, college credit course is taught for a minimum of one class period per day for a year or the equivalent of that amount of time in contact hours. Students participating in the program should have at least a "B" average in college preparatory classes and have to secure five teacher recommendations and complete an essay on why they want to participate in the program to be admitted to the class. And, to address the increasing shortages of skilled teachers in such critical areas as math science and foreign languages, the Teacher Cadet Program has created and adopted programs to encourage students to become interested in teaching in these critical subject areas. The SAY (Science and Youth), MAY (Math and Youth) and FLAY (Foreign Language and Youth) curricula have been developed and adapted by creative and talented Teacher Cadet instructors in the program for use with peer lessons, field experiences and academic fairs. Interactive lessons interest students in these critical subjects. The Teacher Cadet Program has been modeled by Virginia and other states as a means of recruiting individuals into the teaching profession. At the end of the 2006-07 academic year, 39 percent of the 2,556 students who participated in the program indicated that they planned to enter the teaching profession.

The Teacher Cadet program is not a club, but over the last year the program has been instrumental in the establishment of chapters of the Future Educators Association (FEA) program sponsored by Phi Delta Kappa, International. FEA provides individuals interested in teaching as a profession a service-oriented organization where personal and professional relationships can develop as well as information on the teaching profession in general. At the beginning of the 2006-07 school year there were seven FEA chapters in South Carolina; one year later there are over 50, and CERRA hopes to expand the program further, especially to the institutions of higher learning in the state, which presently have only four of the existing chapters.

Participants from the Teacher Cadet Program are prominent in utilizing the Teacher Loan Program (TLP), a program that provides loans to aspiring teachers that offers the opportunity to have the loan canceled if the recipient teaches in a critical need geographic area or critical needs certification area. Created in 1984 as part of the Education Improvement Act (EIA), 12,505 individuals have borrowed money from the program since 1994-95 through the 2006-07 academic year, the period for which there is complete data. Beginning with an initial appropriation of $1.5 million, the annual appropriation for the Teacher Loan Program has varied from $1.2 to $5.3 million since the inaugural year. Including budget transfers, funds available through repayment, and excluding administrative cost, the actual amount loaned should exceed $6.0 million during 2007-08. The Student Loan Corporation (SLC) administers the program for the state of South Carolina. Since the inception of the program over 14,000 individuals have received a loan for at least one year.

According to regulations from the Commission on Higher Education, eligible applicants for teacher loans must meet the following criteria:

- Be a United States citizen;
- Be a resident of South Carolina;
- Be enrolled in good standing at an accredited public or private college or university on at least a half-time basis;
- Be enrolled in a program of teacher education or have expressed intent to enroll in such a program;
- Be in good standing on any other student loan;
- Be in the top 40 percent of their high school graduating class;

- Have an SAT or ACT score equal to or greater than the SC average for the year of graduation from high school or the most recent year for which data are available. For students currently enrolled as undergraduate students, have taken and passed the Praxis I;
- Have an undergraduate cumulative grade point average of at least 2.75 on a 4.0 scale.

Graduate students who have completed at least one semester must have a grade point average of 3.5 (on a 4.0 scale) and must be seeking initial certification in a critical subject area if the applicant already holds a teaching certificate. College freshmen and sophomores may receive loans for up to $2,500 per year, while juniors, seniors, and graduate students may borrow up to $5,000 per year. The maximum total loan amount for any individual student is currently $20,000.

At the end of the 2006-07 school year, there were 5,271 educators working in South Carolina schools who had received loans through the TLP. Eighty-eight percent of those educators were involved in direct classroom instruction. The program generates about 2,000 applications annually and provides loans to approximately 1,500 students each year. Table 3 provides information on the appropriation history for the program, and Tables 4 and 5 provide statistical information on the gender and ethnicity of applicants to the program since 1994-95, the first year for which data are readily available.

Table 3

SC Teacher Loan Program: Appropriations and Loan Amounts Over Time

Year	Appropriation	Legislatively Mandated Transfers	Revolving Funds from Repayments	Total Dollars Available	Administrative Costs	Percent of Total Dollars Spent on Administration	Amount Loaned
1984-85	1,500,000	0	0	1,500,000	124,033	8.3	300,000
1985-86	1,250,000	0	0	1,250,000	71,214	5.7	1,008,115
1986-87	1,943,059	75,000[1]	0	1,943,059	84,376	4.3	1,776,234
1987-88	2,225,000	75,000[1]	100,000	2,325,000	98,976	4.3	2,277,402
1988-89	2,925,000	75,000[1]	350,000	3,275,000	126,941	3.9	2,889,955
1989-90	3,300,000	0	300,000	3,600,000	154,927	4.3	3,284,632
1990-91	4,600,000	1,000,000[2]	300,000	4,900,000	210,741	4.3	3,978,476
1991-92	4,600,000	1,000,000[2]	900,000	5,500,000	217,981	4.0	4,350,908
1992-93	4,775,000	1,175,000[2]	1,350,000	6,125,000	248,703	4.1	4,628,259
1993-94	4,775,000	1,175,000[2]	1,350,000	6,125,000	254,398	4.2	4,805,391
1994-95	5,016,250	1,233,750[2]	1,135,000	6,151,250	272,260	4.4	4,761,397
1995-96	3,016,250	0	1,885,000	4,901,000	219,058	4.5	3,999,053
1996-97	3,016,250	0	1,108,500	4,124,500	222,557	5.4	3,936,538
1997-98	3,016,250	0	2,067,000	5,083,000	248,704	4.9	4,393,679
1998-99	3,016,250	1,000,000[3]	2,565,000	4,581,250	295,790	6.5	4,423,446
1999-2000	3,016,250	1,000,000[3]	2,550,000	4,566,250	272,115	5.0	4,240,693
2000-2001	3,916,250	0	3,000,000	6,916,250	279,800	4.1	5,556,854
2001-2002	3,016,250	145,216*	3,265,000	6,136,034	321,058	5.2	5,815,382
2002-2003	2,863,826	144,471*	2,950,000	5,669,355	346,601	6.1	5,332,946
2003-2004	3,016,250	129,980*	2,953,266	5,863,826	362,600	6.2	5,476,936
2004-2005	3,209,270	0	1,821,610	5,030,880	392,375	7.8	4,638,505
2005-2006	5,367,044	0	354,175	5,721,219	402,300	7.0	5,318,915
2006-2007	5,367,044	0	939,900	6,306,944	437,885	7.0	5,869,059
2007-2008	5,367,044	0	1,070,841**	6,437,885**	437,885**	6.8**	6,000,000**

*Source: SC Student Loan Corporation, 1995-2007. *Mid-year budget cuts.   [1]Transfered to SC State for minority recruitment.*
*[2]Transfered to Governor's Teaching Scholarship Program. [3]Transfered to SDE for technology and GT identification; ** projected amounts*

Table 4

Distribution of Applicants to the Teacher Loan Program by Gender
1994-95 through 2006-07

Year	Number Applied	Gender					
		Male		Female		Unknown	
		#	%	#	%	#	%
1994-95	2,242	246	11	1,476	66	520	23
1995-96	2,024	305	15	1,692	84	27	1
1996-97	1,446	195	13	1,189	82	62	4
1997-98	1,545	247	16	1,241	80	57	4
1998-99	1,569	261	17	1,267	81	41	3
1999-00	1,532	263	17	1,212	79	57	4
2000-01	2,028	299	15	1,628	80	101	5
2001-02	2,297	288	13	1,769	77	240	10
2002-03	2,004	246	12	1,599	80	159	8
2003-04	1,948	253	13	1,480	76	215	11
2004-05	1,735	261	15	1,413	81	61	4
2005-06	1,902	282	15	1,305	69	315	17
2006-07	2,033	328	16	1,482	73	223	11
TOTAL	24,305	3,474	14	18,699	77	2,078	9

Source: SC Student Loan Corporation, 1995- 2007.

Table 5

Distribution of Applicants to the Teacher Loan Program by Race/Ethnicity
1994-95 through 2006-07

Year	Number Applied	Ethnicity							
		African-American		Other		White		Unknown	
		#	%	#	%	#	%	#	%
1994-95	2,242	210	9	20	1	1,580	70	432	19
1995-96	2,024	271	13	31	2	1,664	82	58	3
1996-97	1,446	236	16	14	1	1,115	77	81	6
1997-98	1,545	258	17	12	1	1,195	77	80	5
1998-99	1,569	301	19	9	1	1,193	76	66	4
1999-00	1,532	278	18	14	1	1,164	76	76	5
2000-01	2,028	310	15	25	1	1,555	77	138	7
2001-02	2,297	361	16	15	1	1,630	71	291	13
2002-03	2,004	280	14	14	1	1,506	75	204	10
2003-04	1,948	252	13	13	<1	1,426	73	257	13
2004-05	1,735	263	15	17	1	1,357	78	98	6
2005-06	1,902	267	14	28	1	1,416	74	191	10
2006-07	2,033	356	17	20	1	1,495	74	162	8
TOTAL	24,305	3,643	15	232	<1	18,296	75	2,134	9

Source: SC Student Loan Corporation, 1995-2007.

The TLP is a very successful recruitment program for South Carolina and participants in the program continue to fill South Carolina classrooms. A more recent program, the Teaching Fellows Program, is just beginning to make an impact on South Carolina classrooms. The General Assembly created the Teaching Fellows Program in 1999 to recruit up to 200 high achieving high school seniors each year into teaching. Students who receive a Teaching Fellows award go through a rigorous selection process and are awarded up to $6000 per year as long as they continue to meet minimum criteria. Recipients agree to teach in South Carolina at least one year for each year they receive an award and they sign a promissory note that requires repayment of the scholarship should they not teach. In addition to being an award

instead of a loan, the Teaching Fellows Program differs from the Teacher Loan Program in that recipients do not have to commit to teaching in a critical need subject or geographic area to receive the award. Presently the program serves approximately 700 individuals each year, 175 per cohort. Individuals receiving the scholarships attend one of eleven Teaching Fellows institutions and participate in advanced enrichment programs in education and professional development opportunities during summer months, and are involved with communities and businesses throughout the state. Participants receive up to $6000 in yearly scholarships for four years while they complete a degree leading to teacher certification. The scholarship provides up to $5700 for tuition and board and $300 for summer enrichment programs (contingent on funding from the S.C. General Assembly) administered by the Center for Educator Recruitment, Retention, & Advancement (CERRA). These individuals are expected to enter the teaching profession for a minimum of four years in exchange for the scholarship. They also agree to:

- Enhance the image and esteem of the teaching profession
- Promote and develop innovation and reform in education
- Involve the community and businesses in the education of teachers
- Work in partnership with public schools to train preservice teachers
- Develop educational leadership
- Utilize technology in education to improve student achievement
- Promote multicultural awareness and an appreciation of the state's diverse population
- Provide faculty-wide professional development for the college or university community.

At present five cohorts of Teaching Fellows have graduated from the program, placing 400-500 individuals in South Carolina classrooms. As the larger cohorts begin to graduate, South Carolina should see an ever increasing number of Teaching Fellows recipients in the classroom.

On a smaller scale than any of the previous programs discussed is the Call Me Mister program, a program housed at Clemson University designed to recruit and place African American males into the elementary classroom. According to the mission statement issued by the program, "The Call Me MISTER program is an effort to address the critical shortage of African American male teachers particularly in the State's lowest performing schools. Program participants are selected from among under-served, socio-economically disadvantaged and educationally at-risk communities." The program provides financial assistance in the form of scholarships, an academic support system for students participating in the programs, and a cohort system for social and cultural support. Clemson works with four historically African American institutions of higher learning – Benedict College, Claflin University, Morris College, and South Carolina State University – on the program. Participants also have the option of starting their higher education career at one of five Technical Colleges – Greenville, Midlands, Orangeburg-Calhoun, Tri-County, and Trident. The number of participants in the program has grown to an average of 150 during the last two to three years, with freshmen making up the largest group in 2007-08. Though small overall, the program is recruiting teachers from a part of the community - African American males - where other programs are not being successful.

Another program focusing on the recruitment of African Americans is the Minority Recruitment Program. Begun in 1993-94, the Minority Recruitment Program is located at South Carolina State University and receives $467,000 annually, of which $200,000 is earmarked for loans, to recruit African Americans into the profession. The program provides loans similar to the TLP to African American students at South Carolina State University to enter the teaching profession, though the requirements for admission to the program are different. Since the inception of the program, 110 individuals had completed the program by the end of 2005-06, and 106 had entered the teaching profession. According to the program report issued for the EIA Subcommittee of the Education Oversight Committee, 98 of the 106 (92 percent) that entered teaching are still in the profession. Though producing small numbers, there were 52 active

participants for the 2006-07 academic year, the program addresses an important need in the state – African American teachers. African Americans presently constitute about 17 percent of the teaching corps in the state. More are needed for the future, and on a bright note, over 20 percent of the new hires in 2006-07 were African American.

The programs discussed thus far are designed to recruit individuals into the teaching profession prior to or during the undergraduate years. The programs are recruiting individuals into the profession, though not the numbers needed at the present time. Several programs are designed to recruit individuals into teaching following graduation from college. The program having the greatest overall impact on recruitment is the PACE program - The Program of Alternative Certification for Educators. The program was created as part of EIA to provide conditional certification for individuals who wanted to teach in a critical need subject area, but lacked certification. The program allows individuals to obtain certification while being a classroom teacher by taking courses leading to certification. In addition, PACE participants can receive loans under the TLP of up to $1000 per year to defray the expenses incurred while becoming certified. The loans are canceled as long as the participants teach in a critical needs area. To enter the program, a person must have:

- An earned bachelor's degree or above from a regionally accredited college with a major in a South Carolina certification area. Participants can be evaluated for a major equivalent if they have thirty or more semester hours earned in content area coursework, twenty-one of which were earned at the junior or senior level or above; or twenty-four or more semester hours earned in content area coursework at the graduate level.
- A passing score on the appropriate Praxis II subject area examination(s).
- Employment as a teacher in a South Carolina public school district.
- Verification of two years prior full-time work experience. The work experience must include at least one year of continuous full time work. Part-time work experiences can be combined for an equivalent to one year of full time work experience, but cannot replace the one year of continuous full time work. Work experience does not have to be teaching experience.

Table 6
PACE Information

	Teachers in First Year of PACE	Teachers in Second Year of PACE	Teachers in Third Year of PACE	Teachers in Fourth Year of PACE (extensions granted)
2006	454 (5.6% of new hires)	363	276	50
2005	422 (5.7% of new hires)	292	266	NA
2004^	337 (5.2% of new hires)	311	308	NA
2003	341 (7.1% of new hires)	442	369	NA
2002~	552.4 (9.9% of new hires)	515	396	NA
2001	648 (9.9% of new hires)	NA	NA	NA

^ Data from 83 systems ~ Includes two systems not previously surveyed (Dept. of Juvenile Justice and the SC School for the Deaf and the Blind) - accounted for 20 new hires. *Source: CERRA, 2006-07.*

CERRA collects data on the PACE program as part of the annual Fall Teacher/Administrator Supply and Demand Survey. Table 6 contains data on the PACE program hires between 2001-02 and 2006-07.

The PACE program has contributed between 350 – 500 teachers to the profession each of the last three years, and presently over 1300 individuals are registered in either the first, second or third year of training. Over 450 individuals attended information sessions on the program during the summer of 2007. It is important to note that PACE participants constitute 5-10 percent of the new hires over the last six years.

Another program designed to recruit individuals into the teaching profession after undergraduate school is the Career Changers Program. The Career Changers Program, a loan program, was established in 2000 to assist individuals who want to become teachers and already have a bachelor's degree and work experience, but need a different degree in order to teach. Individuals in the Career Changers Program are eligible to borrow up to $15,000 per year and up to an aggregate maximum of $60,000. The loan can be used for any purpose at the discretion of the recipient; it is not designated for tuition, room, board, books, etc., and the loan gets canceled in the same manner as the TLP as long as the recipient enters the teaching profession in a critical need area. Tables 7 and 8 provide demographic information on the applicants to the Career Changers Program, data that mirrors closely the demographic data on the TLP. The vast majority of applicants are white females, though more African Americans apply to Career Changers than the TLP, and fewer males apply to Career Changers than the TLP.

Table 7
Career Changer Recipients by Gender, 2000-07

Year	Recipient Number	Gender					
		Male		Female		Unknown	
		#	%	#	%	#	%
2000-01	37	4	11	33	89	0	0
2001-02	120	25	21	94	78	1	<1
2002-03	109	21	19	81	74	7	6
2003-04	111	16	14	87	78	8	7
2004-05	145	28	19	116	80	1	<1
2005-06	100	12	12	76	76	12	12
2006-07	96	12	13	71	74	13	13
TOTAL	718	118	16	558	78	42	6

Source: SC Student Loan Corporation, 2000- 2007.

Table 8
Career Changer Recipients by Race, 2000-07

Year	Recipient Number	Race							
		White		A-A		Other		Unknown	
		#	%	#	%	#	%	#	%
2000-01	37	29	78	6	16	1	3	1	3
2001-02	120	89	74	23	19	2	2	6	5
2002-03	109	87	80	13	12	0	0	9	8
2003-04	111	73	66	26	23	2	2	10	9
2004-05	145	121	84	18	12	2	1	4	3
2005-06	100	77	77	17	17	1	1	5	5
2006-07	96	70	73	20	21	1	1	5	5
TOTAL	718	546	76	123	17	9	1	40	6

Source: SC Student Loan Corporation, 2000- 2007.

Since the inception of the program, 718 individuals have received a loan from the program, and 431 have reached cancellation status; of those 431, 312, or 72.4 percent have taught or are teaching to repay the loans and over half the participants are still actively teaching. The program, though recruiting small numbers of teachers each year, is contributing to the recruitment of teachers.

There are two other programs - American Board for the Certification of Teaching Excellence (ABCTE) and Troops to Teachers - recruiting non-traditional teaching candidates into the profession. ABCTE was adopted by the legislature during the 2007 session and the 2007-08 school year will be the first year candidates from that program enter South Carolina schools. The program provides individuals with a bachelor's degree from a regionally accredited college, and who pass the appropriate test developed by ABCTE, to obtain certification from ABCTE. An individual who earns the ABCTE certificate and obtains a job offer from a South Carolina public school can then obtain a one year certificate from the State of South Carolina. Full certification can be earned over a three year period by successfully completing the induction and ADEPT program required of all new teachers.

Troops to Teachers is a cooperative project between the U.S. Department of Education and the South Carolina Department of Education. The program is federally funded to assist retired and separated members of the Armed Forces, as well as Guard and Reserve personnel, with obtaining certification and employment as teachers. Troops to Teachers provides support to personnel who are making the transition to teaching and to the districts who hire them. Originally established in 1994 as a Department of Defense program, oversight and funding for Troops to Teachers was transferred to the U.S. Department of Education by the National Defense Authorization Act for FY 2000, but operation of the program remains with the Department of Defense. The goals of the program are:

1. Help relieve teacher shortages.
2. Provide positive role models for the nation's public school students.
3. Assist military personnel to successfully transition to teaching as a second career. Eligible veterans may receive either a stipend of not more then $5,000 to assist in attaining teacher certification or a $10,000 incentive grant bonus for participants who teach for three years in a high needs school.

The program has produced 375 teachers for South Carolina schools since the program began. For 2006-07, 24 individuals became classroom teachers in South Carolina through the program. The program in South Carolina ranked seventh in the nation for teacher placements of veterans in the classroom. Of the 375 teachers hired 80 percent are males, 20 percent are females, and 52 percent are minorities. Sixty-two percent are teaching critical subject areas and 27 percent are teaching in critical geographical areas. The program recently added the Spouses to Teachers component, one of only three states in the nation to have the program. Future impact of the program could be affected by the re-enlistment patterns in the armed forces.

When looking at teacher recruitment, one fact cannot be overlooked – teacher shortages exist in most subject areas; almost all areas are identified as critical need areas based on teacher vacancies. The certification areas that have consistently had unfilled vacancies across the state year after year are science, mathematics, and special education. Table 9 contains data from the 2006-07 Fall Teacher/Administrator Supply and Demand Survey on vacancies last school year.

Table 9
Vacancies by Area of Certification, 2006-07

SUBJECT	Number of teachers		
	Elementary	Middle	High
Agriculture			2
American Sign Language (ASL)	0	0	0
Art	6	0	3
Biology			5
Business Education - including Accounting, Keyboarding, Marketing		2	3
Chemistry			3
Dance	0	0	1
Driver's Education			2
Early Childhood/Elementary	86.5		
English for Speakers of Other Languages (ESOL)	2	2.5	6
English/Language Arts		27	23
Family and Consumer Science		1	2
French	0	0	1
German	0.2	0	0
Guidance	3	5.5	6
Media Specialist	7	2	1
Music/Band/Chorus	16	7	5.5
Physical Education	7	0	2
Physics			0
Reading	2	0	1
Related Arts	0	0	0
School Psychologist	6	2	4
Science		32	27.8
Social Studies		16	12.5
Spanish	4	6	12
Spec. Ed: Deafness & Hearing Impairment	4.5	1	2
Spec. Ed: Emotional Disabilities	6	8	1
Spec. Ed: Learning Disabilities	24.8	24	32
Spec. Ed: Mental Disabilities (EMD/TMD)	9	11	5
Spec. Ed: Multicategorical (Generic)	6	2	6
Spec. Ed: Orthopedically Impaired	1	2	0
Spec. Ed: Severe Disabilities	4	1	0
Spec. Ed: Visual Impairment	1	0	1
Speech and Drama	0	0	0
Speech Language Therapist	40.5	9	4.5
Technology Integration Specialist	0	0	3
Theatre	0	0	0
Trade and Industry		0	2
Other:	9	5	13
TOTAL: 683.3 (over counts by 3: 0.44%)*	245.5	192.5	245.3

*Break out by position resulted in three more vacancies that reported overall. Source: CERRA, 2006-07.

Early childhood is an area that may have teacher certification shortages in the future as the number of four-year old programs increases. Middle school certification is an area of concern because middle school certification as a specific area of certification has developed only

recently, but the need to get all teachers highly qualified as required by No Child Left Behind increases the speed at which middle school teachers need to obtain middle school certification. While math, science, and special education positions go unfilled each year, rarely does a social studies position go unfilled for the lack of a certified candidate. Vacancies in social studies often occur because individuals are unwilling to relocate. Social studies is one of the few certification areas that is not identified as critical need, along with health, agriculture, and school psychologists.

Another area of recruitment that has only recently attracted specific attention is actual recruitment by institutions of higher learning of students into the field of education. Colleges and universities often recruit students for the fields of engineering, business, mathematics, or one of the sciences, but seldom do these institutions recruit high school students or undergraduates with undeclared majors to become teachers. With South Carolina needing, according to the annual Fall Teacher /Administrator Supply and Demand Survey, an average of 6,974.1 new teachers each year over the last six years to replace retiring or leaving teachers, and with 474.7 of those positions going unfilled each year, the state's teacher preparation institutions must do a better, and more vigorous job of recruiting individuals into the teacher preparation programs.

How should they do this? Time, money and effort need to all be allocated by each institution to the recruiting of individuals into education. In Georgia, an approach adopted by the Board of Regents for the state university system in 2005 was to set the goal of producing 7,000 new education graduates, including 1800 minority graduates, by the end of the 2009-2010. In 2003-04, the system produced 3,155 education graduates. Of the 3,155, less than 800 were African American. The Board of Regents set a goal for each teacher preparation institution to meet by 2010 and challenged each institution to find the means to meet the goal. Increasing the number of education graduates by 222 percent in just over five years is a tall task.

One South Carolina institution – South Carolina State University - is looking at establishing a new program to help recruit teachers into the education program. The program – to be called The SCSU Bridge Program – would establish formal working ties between the university and the school districts of the I-95 corridor to provide African American teachers to those districts. Since 1975, when 32 percent of South Carolina's teachers and 40 percent of the students were African American, the percentage of African American students has increased to almost 48 percent, while the percentage of African American teachers has declined to 17 percent, The university acknowledges that the number of graduates from its program, and the number of African American education graduates statewide, has declined in recent years and is insufficient to meet the demands of a growing African American student population.

The focus of the program would be to work with promising high school students in preparing for the SAT or ACT, and for preparing for the Praxis I exam, a basic skills exam developed by ETS and utilized across the nation for admission to teacher preparation programs. The program would also provide loans to students that could be canceled by teaching in the participating districts, and would provide a two week summer experience to get the students ready for matriculation into college. After matriculation into college, the program would provide students with tutors as necessary, provide mentors and advisors, provide access to software for mastery of material on the Praxis II content tests and the Principles of Learning and Teaching test, and offer enhancement seminars in reading, writing, and mathematics.

Recruitment has one other aspect that is often overlooked by educators and policy makers, and that is the recruitment of teachers from one district to another district. Over the last five years approximately eight percent of the state's teachers have left the classroom each year. The actual turnover rate, however, is much higher, as an additional four percent of teachers changed

districts each year, and rates of change among schools within districts is unknown. At the very least, 12-13 percent of the teachers are new to their classrooms each year, which results in a loss of continuity and focus on instruction and instructional initiatives at the school level. Teacher turnover, the primary cause for recruitment, is not just about people leaving the profession – it is often about movement within and among districts.

Districts and schools often "rob Peter to pay Paul" as they seek to fill the vacancies that exist each year. Numerous districts have developed incentive programs described in the literature review at the beginning of this report. The incentive programs range from one time bonuses for certain subject area teachers, others include moving expenses, and still others, like Dillon Three, are beginning to provide assistance on student loan repayment and assistance in finding a place to live. Fairfield County advertised for teachers in late July 2007, offering bonuses of $6,000 to science, mathematics, and special education teachers and $4,000 bonuses to elementary teachers. Additional bonuses were available if a teacher has a high success rate on Advanced Placement tests or End of Course tests. Richland One has developed incentives for its lowest performing schools – called A Plus schools, and is offering qualified candidates the opportunity to earn a Master's Degree in Divergent Learning from Columbia College at district expense. Teachers who earn the degree must agree to teach in the school for several years or they have to repay the district for the cost of the degree.

The cost of turnover is difficult to determine, but the National Commission on Teaching and America's Future has developed a teacher turnover calculator to help school district personnel and the general public understand the cost of teacher turnover. One upstate South Carolina urban elementary school experienced a 20 percent turnover (7 of 36) of teachers between 2006-07 and 2007-08. Excluding any bonus that the district might provide, the calculator estimates that replacing those seven teachers will cost the district $58,800. This cost does not include any district level costs, the costs to student learning, nor other "hidden" costs for which no data are available. Between 2005-06 and 2006-07, one lowcountry South Carolina rural school district experienced a loss of 23 teachers out of 151 positions. According to the calculator, the turnover cost the district $143,750, not including any of the hidden costs. The financial impact of teacher turnover is significant to school districts and the taxpayer, let alone the cost to student achievement.

Teacher Preparation, Training and Certification
As complex as teacher turnover and teacher recruitment is, Teacher Preparation, Training and Certification is equally complicated. There are presently 30 institutions of higher learning in South Carolina that offer one or more teacher preparation programs. Information on the 30 institutions is available at http://www.scteachers.org/educate/edprog.cfm by both institution and/or by program (see Appendix B for a list of the institutions). The number of institutions offering a program of study varies; 27 institutions offer a program in Early Childhood, but only 10 offer a program in Spanish, and only USC-Columbia offers a media specialist program. On average, the 30 teacher preparation institutions offer 13 programs, with USC-Beaufort offering only a program in early childhood, to South Carolina State University, which offers 34 programs at either the undergraduate or graduate level. All programs must meet NCATE (The National Council for Accreditation of Teacher Education) standards in order to offer degrees. New programs must also receive accreditation and approval by the Commission on Higher Education. Many institutions of higher learning have been dropping programs in recent years as the number of students enrolled in the program has declined or evaporated.

One major issue with the Teacher Preparation, Training and Certification area is the fact that the 30 institutions report the number of individuals in their programs differently. Each year each institution is required to report through the Title II requirements the number of individuals

passing the various tests for certification (Praxis I, Praxis II). However, institutions report information differently so that accurate and complete data are not available. For example, some institutions report only completers, those that have completed all requirements for completion of the degree and/or certification, while other institutions report the number of individuals entering a program.

The data in the Title II report are interesting, and they document the challenge facing South Carolina in producing enough teachers to meet the needs of the state. During the 2003-04 academic year, as reported in the 2005 Title II State Report, only 66 individuals statewide took the Praxis II mathematics content test, with 64 passing. Fewer than ten individuals took the German, Spanish and French tests, 111 took the English Language, Literature and Composition test, with 109 passing, while 822 individuals took the Elementary Education test, with 807 passing. And, while pass rates for these tests are impressive, averaging 97-98 percent, the number of individuals taking the various tests is not sufficient to meet the needs of South Carolina. Many of the state's teacher preparation programs no longer allow teacher candidates to enter student teaching unless they have passed the appropriate Praxis II tests. The number of individuals in a given education program may be greater than the number taking the Praxis tests, but the number of completers of the programs are much smaller to indicate success rate of graduates. The most recent Title II report for South Carolina, and the reports from 2001-2006 for all states, is available at https://www.title2.org/Title2DR/StateHome.asp.

The Commission on Higher Education collects data each year on degrees awarded, and on majors, from all institutions of higher learning, including degrees in education and the various disciplines like history, biology, and mathematics. However, the number of degrees awarded in an area of education does not mean that the individual awarded the degree applies for a South Carolina teacher certificate or intends to teach in the public schools. At schools where a large number of students are from out of state, like Furman and the Citadel, many of the education majors do not intend to teach in South Carolina; instead, they intend to return to their home state to begin their careers. The number of continuing students from year to year is difficult to track, and it is unclear how many students take a semester or year off during the course of their college career, for whatever reason, in order to know how many graduates in education or related fields will be produced each year. In reality, there are little concrete data on the actual number of graduates eligible to apply for certification; prior to 2006-07 there was no clear information on what percentage of the graduates eligible for certification actually apply for, and receive, certification.

Institutions also set the requirements for student teaching, and until 2006-07, the Division of Educator Quality and Leadership of the State Department of Education did not know how many students were student teaching each academic year; each institution placed the practice teachers without having to notify the Division of Educator Quality and Leadership. Beginning with the 2006-07 year, however, individuals entering student teaching had to begin the application process for certification in order to pass a background check; failure to pass the background check prevents the individual from student teaching, and subsequently, getting a certificate. Requiring individuals to begin the application process prior to student teaching now allows the state of South Carolina to better track and predict the number of individuals completing education programs in South Carolina institutions, receiving a South Carolina certificate, and subsequently entering the profession. During 2006-07, there were 2,757 individuals who student taught in South Carolina.

The lack of clear data on teacher recruitment and preparation is a problem that is not unique to South Carolina; other states are experiencing the same problems. At least three states – Virginia, Louisiana, and Kentucky – are in the process of developing data collection systems to

alleviate the problem. In Virginia, the state has developed a Web based system to gather information on teacher preparation candidates from the point they enroll in an education program, through the first five years of employment or the first five years after graduation. Virginia's program, called VITAL – Virginia Improves Teaching and Learning, has three components, one to collect data on teacher application into education programs, a second to allow for surveys with the individuals that enter the teacher application process, and a third to report and analyze data from the various institutions of higher education that prepare teachers. The system was developed to address the deficiencies Virginia identified in teacher preparation data collection –fragmented agency responsibility for data collections, lack of personal identifiers, different schedules of data collection, and no standard data definitions. Virginia used a Teacher Quality Enhancement Grant from the US Department of Education to establish "a data-collection system to provide credible and reliable information on teacher and teaching quality indicators." Data collected through the system will be used to:

- identify ways of affecting teacher retention and effectiveness
- assess the supply of potential teachers
- aid in predicting and responding to shortage areas
- support research efforts to enhance teacher education programs.

The system is being piloted during the 2007-08 academic year at several institutions with full implementation expected during 2008-09.

A system similar to VITAL would alleviate many of the data collection problems regarding teacher recruitment and retention for South Carolina. Obtaining high quality longitudinal data for the state would provide a better understanding of the teacher recruitment and retention issue and allow for better planning in the future.

The certification process often comes under fire. The institutions of higher education set the requirements for program completion and verify for the Division of Educator Quality and Leadership that an applicant for certification has met the requirements of the specific program. To begin the certification process, an individual must submit a two-page application, along with a completed fingerprint card for FBI screening and pay a $75 non-refundable fee for the screening. The applicant requests a transcript from the college or university verifying graduation and requests the designated official at the college to complete and submit a recommendation for certification form to the Division of Educator Quality and Leadership. Finally, the applicant must have passed all pertinent Praxis II content exams and Principles of Teaching and Learning exams and have the scores submitted to the Division of Educator Quality and Leadership. Once the applicant passes the background check and all required portions of the application are received and verified, the Division of Educator Quality and Leadership issues a certificate.

In recent years it has taken the Division of Educator Quality and Leadership as long as 16 weeks to issue a certificate. The division receives up to 3,000 inquiries a week, depending on the time of the year, on certification and recertification issues. Over the past year the Division of Educator Quality and Leadership has taken action to rectify this problem. The General Assembly provided the division with five additional FTEs in the 2006-07 budget and additional people were hired to handle the volume of mail. In addition, a specific phone call center has been set up during the afternoon hours to address telephone inquiries, freeing up the certification specialists to handle the issuing of certificates. In mid-June 2007, the wait time to receive a certificate was down to about two weeks. The division hopes to keep the reply time down to 1-2 weeks in the future. Alleviating the backlog should lead to greater satisfaction on the part of educators with the certification office and perhaps give the division an opportunity to

analyze the vast amount of data contained in the certification files in regards to teacher recruitment and retention.

<u>Retention</u>
Retention is a major issue in the teaching profession (in fact, the Task Force identified retention as the most important issue facing the profession at the first task force meeting). There are several times in the career of an educator when the topic is paramount. The first time that retention is an issue is when an individual is finishing his or her education degree and considers entering the workforce. Due to a lack of data, it is unclear how many individuals complete an education program, earn a degree, but never enter the teaching profession, for reasons that are unknown.

The second retention point comes during or at the end of the first year of teaching. The first year of teaching is more difficult than most people imagine, and a good support system for the new teacher is paramount to keeping the person in the profession. As part of South Carolina's ADEPT program (Assisting, Developing, and Evaluating Professional Teaching), new teachers are supposed to have mentors who provide guidance and direction during the first year, also known as the induction year. Mentoring has been used by businesses and other professions as a means of providing guidance to new employees or to employees who show great promise in the profession. Mentoring has also been shown to help most first and second year teachers cope with the many demands of their first teaching position, including:

- relocation, resulting in a lack of social and/or familial support system
- new curriculum, requiring the development of lesson plans for every day
- classroom management issues
- parent conference issues
- lack of materials to establish a classroom
- unexpected paperwork, for which no training has been provided
- little to no free time during the work day to take care of essential personal tasks
- being given the lowest level classes to teach.

A well-trained mentor should provide guidance for the new teacher in the areas of classroom management, curriculum implementation and pacing, instruction, and assist the new teacher with many of the unfamiliar tasks as well as provide moral support or, sometimes, just a "shoulder to cry on" when a trying day overwhelms the new teacher. Mentoring is required by South Carolina law for all teachers participating in the induction program, a part of the ADEPT program. The South Carolina Induction and Mentoring Program: Implementation Guidelines, call for extensive training for teachers selected as mentors. According to the guidelines, teachers selected as mentors also should have at least five years of teaching experience, have demonstrated "proficiency in the use of computer technology," and should want to be a mentor. Districts are responsible for selecting mentors that have the following qualifications or capabilities:

- has knowledge of beginning-teacher professional development and effective adult learning strategies;
- is conversant with the ADEPT process;
- has knowledge of researched-based instructional strategies and effective student assessment based on the state's academic standards;
- understands and appreciates the importance of an educator's having a thorough command of the subject matter and skills that he or she is teaching;

- understands and appreciates the importance of literacy in the teacher as well as the student and therefore underscores the necessity that language, as both reading and writing, be emphasized in every classroom;
- has a record of exemplary teaching and professional conduct that allows him or her to serve as a role model;
- has effective interpersonal and communication skills;
- has a demonstrated commitment to his or her own professional growth and learning;
- has the willingness and the ability to participate in professional preparation to acquire the knowledge and skills needed to be an effective mentor;
- has the willingness and the ability to engage in nonevaluative assessment processes, including the ability to hold planning and reflective conversations with beginning teachers about their classroom practice;
- has the willingness and the ability to work collaboratively and share instructional ideas and materials with beginning teachers; and
- has the willingness and the ability to deepen his or her understanding of cultural, racial, ethnic, linguistic, and cognitive diversity.

Districts are also expected to provide mentors with time to observe the new teacher and time for the new teacher to observe the mentor and provide time for the two to meet at least once a month. Furthermore, the district is supposed to have the mentor selected for the new teacher by the beginning of school, or in the case of a late hire, within two weeks. And, the district must use at least two of the following three factors when matching a mentor with the beginning teacher: 1) matching areas of certification (*matching* certification is *required* for special-area educators), 2) matching or close grade levels in teaching, and/or 3) physical proximity to one another on the school campus. Mentors must not serve as evaluators of the new teacher.

The South Carolina Induction and Mentoring Program: Implementation Guidelines are scheduled to become operative at the beginning of the 2008-09 school year, and the level of implementation is dependent on the funding for the program provided by the state and local districts. The State Department of Education requested $12 million for the program in the 2007-08 budget, the funds to provide professional development and training seminars for up to 5000 mentors, stipends for mentors, release time for mentors (substitutes or other expenses), and district mentoring coordinators. Funding was not provided in the 2008 fiscal year budget and districts are using available local funds to develop their implementation plans for the guidelines and, in some cases, training seminars for mentors and stipends. Many mentors receive little training for their task, and, therefore, may not provide the assistance most first year teachers need. As stated earlier in the literature review section, a strong well-implemented mentoring program can reduce attrition by first year teachers by providing the guidance and support necessary to ensure a positive first year experience.

While a strong mentoring program is important to the retention of first year and other novice teachers, adequate preservice preparation is also important. There are individuals who maintain that teacher preparation programs do not adequately prepare individuals for the first year of teaching (the Board of Regents for the University of Georgia system addressed this issue by taking the unprecedented step of establishing a "Warranty" for their teacher graduates in 1999, agreeing to remediate, at the preparation institution's cost, any teacher determined to be inadequate during the first two years in the classroom; at this time there is little data to determine the impact of the "warranty"). While the assertion may be valid in some ways, all of the pitfalls that a new teacher faces cannot be anticipated. Areas that teacher preparation programs are often criticized for not preparing teachers adequately for are classroom management, time management, and parent conferencing, but in many ways it is impossible to completely prepare an individual for all of the situations they will encounter. A teacher

preparation program cannot prepare a new third grade teacher for the number of transient students she will encounter during her first year; during the 2006-07 school year one new third grade teacher in an upstate school district had 40 different students on her roll at some point during the year, a situation which would challenge a veteran teacher. And, while all individuals new to the workforce in their profession experience similar employment issues, new teachers are especially vulnerable to pitfalls because teaching is more individualized than most professions; thus, the need for a trained mentor to assist with the assimilation into the workforce.

CERRA collects data on the reasons given by educators to the school district for leaving a district or position as part of the annual Fall Teacher/Administrator Supply and Demand Survey. The data from the last six surveys is presented in Table 10. The data in the table are interesting – data for 5,383 are given in 2006-07, and only about five percent admitted to leaving the profession, though no reason is known for another 21.5 percent. Termination occurred in 4.1 percent of the departures, while retirement led to the departure of another 28.3 percent, a teaching position in another district 29.6 percent, and 8.7 percent left for a teaching position in another state. Data from previous years show similar trends in the percentages in the various categories.

Table 10

Reasons Given for Leaving District								
	Retired	**Left Profession**	**Another Teaching Position In-State**	**Another Teaching Position-Out-of-State**	**New Position In District**	**Position in Education Out-of-District**	**Termination**	**Unknown/ Other/Not Reported**
2006	1,521.5	267	1,592	471	80.5	70	222	1,159
2005	1,193	262	1,419	388	153	212	134	1,869
2004^	1,149.5	204	1,305	395	113	196	301	1,549.5
2003	913.5	295	725.5	317	89	28	246	1,390
2002~	1,044	472	942	341	90	84	288	2,164
2001	1,168	435	1,308	409	193	79	203.5	1,254

^ Data from 83 systems ~ Includes two systems not previously surveyed (Dept. of Juvenile Justice and the SC School for the Deaf and the Blind) - accounted for 20 new hires. *Source: CERRA, 2006-07.*

National statistics indicate that up to 50 percent of new teachers leave the profession within the first five years of entering. Data on South Carolina's attrition rate collected by the Division of Educator Quality and Leadership of the State Department of Education and presented in the 2007-08 budget request from the Department stated that 16.7 percent of teachers leave the profession after the first year of teaching, 27.5 percent leave by the end of the third year, and 33.5 percent leave after five years. While South Carolina's rate may be one in three teachers leaving the profession instead of one in two, the rate of attrition must be reduced. Many individuals leave the profession because of adverse working conditions, which include:

- Unsupportive administration
- Lack of instructional materials
- Lack of collegial atmosphere among faculty
- Lack of empowerment by administration
- Poor facilities
- Antagonistic parents

- Disrespectful students
- Large class sizes
- Expectations by district or school administrators to work days off contract without pay.

The 2004 report from the South Carolina Teacher Working Conditions Survey found that the lack of a collegial atmosphere among faculty was the working condition most often cited as affecting teacher retention. Mentoring could be one way to improve collegiality. Lack of leadership or an unsupportive administration was cited second. Lack of empowerment was third in importance, and lack of materials/poor facilities was fourth.

While working conditions are very important to teacher retention, teacher pay is often cited as a primary concern for both recruitment and retention of teachers. In fact, the primary incentives South Carolina uses to retain teachers, and in some instances recruit teachers, are related to teacher compensation. They are:

- Stipend for earning certification from the National Board for Professional Teaching Standards (NBPTS), hereafter called National Board Certification
- TERI - Teacher and Employee Retirement Incentive program
- Signing Bonuses/Moving Costs
- Step raises on the Minimum Salary Scale
- Increases in compensation for advanced degrees.

Presently there are 5,076 individuals in South Carolina with National Board Certification. Some of these individuals have retired or entered the ranks of administration. Each of those individuals who are classroom teachers receives a $7,500 annual stipend from the state; many receive local stipends from their districts, with local stipends reaching as much as $5,500 annually. There are districts, however, that provide no additional stipend or that provide a stipend only if the national certified teacher teaches in an underperforming school (a list of the local stipends is found in appendix C). There is little doubt that the ability to earn National Board certification has retained some teachers in South Carolina, exactly how many individuals would be difficult to determine. More data may be available on that issue as the certification begins to expire for those who first received certification; it will be interesting to see how many individuals pursue recertification at the national level.

The full impact of the TERI program on the retention of teachers is also unknown; the South Carolina Retirement System collects data as educators, not classroom teachers. The program originally was developed for educators but was expanded to all state employees. A recent editorial in *The State* criticized the program as a "fiasco." The paper stated the program did not make sense from the beginning, describing the rationale for the program as "Hey, we can entice smart 18-year-olds to become teachers by promising that if they put up with the hassle for 28 years, and do a *really* good job, they'll get a little extra for staying around five *more* years." As of May 2007, however, 11,530 school district employees had participated in TERI since its inception, a figure that represents 48 percent of all participants. Of the 11,530, 7,034 have ended their participation in the program, but some of the individuals who have completed the TERI program may still be teaching as rehired working retirees. Additional data are needed to understand how many teachers are actually working retirees, but access to the retirement data file was not available.

Data are available on how many educators are retiring each year. Over the last five fiscal years (2003-2007), an average of 1,182 educators have retired each year based on service data from the South Carolina Retirement System. Another 318 educators have retired early on disability. Finally, an average of 1,448 educators have elected to participate in TERI each year, though the

number choosing TERI dropped significantly in fiscal years 2006 and 2007 from previous years. Thus, on average for the last five years, 2,948 educators have retired or reached retirement status, but TERI is keeping almost half of those individuals in the schools (49.12 percent).

While TERI may be keeping individuals eligible to retire in the schools longer, the recruiting bonuses discussed earlier in this report may be contributing to teacher turnover. In addition to the districts reported in the recruitment portion of this report, at least 11 districts (the total number is unknown as some districts have not reported their incentives) offer signing bonuses of between $500 and $2,500 and six pay moving costs up to $1,500 to teachers electing to teach in their district. Most of the signing bonuses are for science, math, or special education teachers, and districts disburse the payments differently; some pay the bonuses up front, others half up front, half at the end of the year, and still others spread the bonus out over the year. However, there is nothing to prevent individuals from moving from district to district to receive a bonus year after year, though some districts are now restricting the ability to earn a bonus to once from that particular district.

While signing bonuses are used by some districts, all districts are required to use the minimum salary scale established by the state as the base pay for their teachers (see Appendix D). Most districts add a local supplement to the scale. For 2007-08, the average teacher salary in South Carolina is expected to be $45,479, $300 above the southeastern average. States included in the southeastern average with South Carolina are Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Tennessee, Virginia, and West Virginia. North Carolina is in the process of raising the average teacher salary to $52,296 by 2008-09, and Georgia was paying $49,836 in 2006-07. The South Carolina average, however, includes the stipends for Teacher Specialists, National Board certified teachers, and all local supplements, and because of these additional programs are included, the average teacher makes less than the figure cited. In districts that pay beginning teachers at the minimum level for a bachelor's degree ($26,975 in 2006-07), the final take home pay after required deductions and taxes equals about $16,000. The beginning salary is not an incentive to enter the profession, though many teachers will admit they did not enter the field for the money, but to make a difference in the lives of children. And, where the starting salary is greater than the minimum, like Horry County, new teachers still have a difficult time affording to live off of the salary paid because of the high cost of living.

In January 2006, the South Carolina Association of School Administrators (SCASA) published the results of a recent study conducted by the Teacher Salary Schedule Revision Task Force (see Appendix E). Created in August 2005 in response to work initiated by the Personnel Division's Recruiting Action team, the report from the task force presented the following recommendations regarding the Minimum Salary Scale:

- Increase funding in order to raise the annual average teacher salary in South Carolina to the average of North Carolina and Georgia.

- Include in the Minimum Salary Schedule differential pay options for poverty, critical need subject areas, mentoring, and National Board Certification either by multipliers, line item, or column.

- Increase the number of steps on the Minimum Salary Schedule to 27, by annually funding an additional step for the next six years.

- Continue to provide $7,500 annually to teachers who are certified by the National Board for Professional Teaching Standards.

- Provide $2,000 to teachers who serve as mentors and meet all qualifications and training requirements as outlined in the state's Mentoring and Induction Guidelines approved by the State Board of Education in July 2005.
  (http://www.scteachers.org/index.cfm)

- In addition to step increases, grant lump sum longevity bonuses of $3,000 to educators employed in South Carolina public schools after every five years of service instate as identified by the following PCS codes: 03-08, 10, 11, 17 & 18 starting after year 10.

- Increase base pay of educators teaching in a State Board of Education approved critical needs subject area by a specified index as determined by the school district's free and reduced lunch percentage.

- Increase base pay of educators teaching in hard to staff schools by a specified index as determined by the school district's free and reduced lunch percentage.

The recommendations of the Teacher Salary Schedule Revision Task Force have merit, but this task force did not think the recommendations addressed all of the issues. One pressing issue to new teachers, and teachers who have recently received an advanced degree, is student loans. Though South Carolina has the Teacher Loan Program, and some of the federal Stafford Loans can be canceled if the recipient teaches in a qualifying school, many new and continuing teachers carry student loans that cannot be canceled and must be repaid. The loan payments, on amounts up to $30,000, often become a burden for the new teacher, especially on take home pay of $16,000 a year ($1,333.33 per month). Several school districts recognize that the debt is a burden and as a recruitment tool they are offering direct assistance or repayment of the loans for the new teacher. Direct repayment of the loans for the new teacher increases the take home pay of the teacher more than increasing the teacher's salary, for taxes and other deductions are not increased.

Another compensation issue of primary importance is a place to live. Housing, in general, is an issue in many districts, though the issue in some districts, like Horry, is affordable housing, while in other districts, like Abbeville, the issue is available housing. Some school districts in South Carolina are considering returning to the teacherage, a residence building owned by the school district made available to teachers at low rent. The teacherage, while solving the problem of where a teacher can live in a district, may also provide a social network for individuals who have moved into the districts to teach, but have few or no family or friends living nearby, a common complaint of individuals who move to a new area to teach.

Teachers often seek graduate degrees to increase their salary and improve their skills. An earned master's degree increases a teacher's salary about $4,300 and a doctorate increases the salary about another $5,700 over the Master's degree. The salary increases, however, are often offset by the loan payments teachers are frequently saddled with to obtain the degree. One recent national study on teacher compensation suggested eliminating the stipend for additional degrees, stating there was no correlation between student achievement and teachers with advanced degrees, but research in South Carolina has shown that students of teachers with master's degrees do achieve at a higher level. Since most teachers personally fund their advanced studies, fewer teachers might pursue the degrees if a subsequent salary increase was not forthcoming to help pay back the loans or the money expended.

Perhaps it is time to be more creative in regards to teacher salaries, as presented in the SCASA Teacher Salary Schedule Revision Task Force report. Perhaps it is time to stop paying all teachers the same wages and base salary on the area of certification. Salary is cited as a reason for the lack of science and mathematics teachers, that individuals can make significantly more money in the private sector; actuarial mathematics majors often start out between $75,000 and $90,000. Other ideas include the development of a merit pay system and to let the base salary be the lowest anyone can receive, but if a merit system is established, is it based on what you know, what you do and/or how well you do it, and how would it be measured, etc.? Over 40 schools in South Carolina are presently participating in the Teacher Advancement Program (TAP), a merit pay program developed in conjunction with the Milken Foundation. Grants have been secured to implement the program, but once the grant money is expended, there is concern that some of the districts implementing the program may not be able to sustain the program once the grants expire. Merit systems exist in many states or districts, including Arizona, Iowa, New Mexico, and Denver, Colorado.

Other ways to creatively increase compensation for teachers include:

- Stipends for individuals serving as: department chairs, team leaders, lead teachers, club sponsors or other extracurricular areas, service on school committees, ADEPT evaluators, etc.
- Stipends of at least $2400 for serving as mentors
- Mileage for teachers living at least 25 miles from the school
- Professional spending accounts for school supplies and curriculum materials
- Funding of up to $100 per year for dues to professional content or curriculum organizations
- Participation in state professional curriculum organizations conferences at least once in 3 years; participation in national conferences once in 5 years, but not in same year
- Increased minimum salaries for teachers with master's or doctorate degrees
- Bonuses for unused sick leave days not used each year
- Compensatory time (on professional development days) for serving as substitutes; or, bonuses for each cumulative day served as a substitute
- Stipends for attending professional development programs or seminars in the summer or on weekends
- Stipends for home bound teachers at $25 per hour and mileage
- Stipends for after school activities, Saturday school or other extended learning time or disciplinary function at $25 per hour
- Adequate stipends for classroom teachers who also serve as athletic coaches.

While salary is often cited as a reason an individual leaves the profession, it should be noted that there are many other reasons for attrition, including:

- Starting a family
- Job change or transfer for spouse
- Marriage
- Returning to school full-time
- Becoming a caretaker for parent or other family member
- Personal sickness

Data were analyzed on the individuals who left teaching in South Carolina between 2005-06 and 2006-07 to try and determine what occupation the former teacher entered after leaving teacher. Forty-five percent of the almost 4,200 individuals who left educator positions in South Carolina

earned no wages in South Carolina during the last two quarters of 2006, and another 21 percent earned no wages during the fourth quarter. The data indicate that many of the individuals who leave the profession are not remaining in the work force in South Carolina, and if they do remain in the state, they are not walking into new jobs immediately.

And the attrition rate for teachers during the first five years may not be out of line with other entry level jobs requiring a bachelor's degree. Accounting firms report a 20 percent turnover rate during the first two years. Nurses change positions frequently, often in response to bonuses offered by competing hospitals or other health care related offices. Too, college graduates today are often told by economists and job counselors that they will have up to 20 jobs during their work career. Gone are the days when most individuals choose a profession and stay with it all of their working life.

But the fact that other industries experience a high turnover rate, or college graduates are told to expect a multitude of positions during the work career, does not lessen the importance of recruiting and retaining a high quality teacher corps. A stable and sufficient teaching force is necessary to provide all students with the opportunity to achieve at high levels, and to ensure that the state has a well-educated work force for economic growth.

<u>Findings</u>

- Teacher recruitment and retention is a complex issue for which there is no quick solution or "silver bullet" fix.

- South Carolina's teacher preparation institutions and the alternative certification programs are not producing the sufficient number of graduates to meet the state's needs.

- South Carolina has a number of teacher recruitment and retention programs in place that are successful in many ways.

- Most areas of certification are short teacher candidates or teachers; science, mathematics, and special education suffer the most critical shortages; early childhood could be a problem in the future.

- The data to analyze the number of teachers being produced and needed in the future are not available.

- Additional research on teacher recruitment and retention patterns in South Carolina is needed.

- Many beginning teachers do not get the support they need from veteran teachers and/or mentors to be successful, contributing to a high attrition rate from the profession.

- Recruitment of minority teachers – African-American, Hispanic, Asian – and recruitment of male teachers into the profession in larger numbers is needed.

- Working conditions are a major factor in teacher retention.

- Salary is a factor in teacher recruitment and retention, but increasing salary alone will not solve the recruitment and retention situation.

- Variations on the salary structure may be needed, to include differentiated pay for different areas of certification, a merit pay system, or more creative methods of compensation.

Recommendations

- A data collection system similar to the one implemented in Virginia should be developed or purchased and adapted for South Carolina to collect more accurate and definitive data on teacher recruitment and retention for research and development of policy in the future.

- The South Carolina Induction and Mentoring Program: Implementation Guidelines should be fully funded in 2008-09, including stipends for mentors, to strengthen district leadership and provide for the effective mentoring of beginning teachers.

- Marketing of the teacher recruitment and retention programs that presently exist in South Carolina should be expanded through the responsible agency or sponsoring institution to increase the awareness and effectiveness of these programs, especially in the recruitment of males and African Americans.

- The presidents and provosts of the teacher preparation institutions, with the assistance of the Commission on Higher Education, should convene and collaborate on a comprehensive plan to recruit the best and brightest individuals into the teacher preparation programs and increase the number of graduates prepared to teach in South Carolina schools.

- A study on teacher compensation, to include examination of innovative ways to increase compensation for teachers beyond traditional salary, should be conducted by the State Budget and Control Office.

Appendix A
Teacher Recruitment and Retention Task Force

Ms. Wanda Summers, Teacher, Edisto Elementary School
Ms. Leslie Carter, Teacher, Myrtle Beach High School
Ms. Jennifer Hunter, Teacher, Hannah-Pamplico High School
Mr. Gary Bettinger, Teacher, Bates Middle School
Ms. Terri Denise James, Teacher, Rock Hill High School
Ms. Barbara Hairfield, Teacher, Brentwood Middle School
Ms. Tara Brice, Teacher, Belton Elementary School
Ms. Yvette Salters, Teacher, Pacolet Elementary School
Ms. Michele Antonucci, Teacher, Belleview Elementary School
Ms. Kindra Simon, Teacher, Central High School
Mr. Wendel Sims, Teacher, Crayton Middle School
Dr. Gayle Sawyer, CERRA
Dr. R. Lynn Kelley, Commission on Higher Education
Mr. Mike Fox, Student Loan Corporation
Dr. Mary Steppling, Chair, Department of Education, Columbia College
Dr. Allison Jacques, Office of Educator Certification, SDE
Dr. Lonnie Craven, Office of Educator Certification, SDE
Dr. Don Stowe, Office of Educator Certification, SDE
Dr. Leonard McIntyre, Dean, Education, Humanities & Social Sciences, SC State University
Ms. Traci Young-Cooper, Richland County School District One
Ms. Terri Myers, Director of Personnel, Berkeley County Schools
Mr. Charlie FitzSimons, Former President, SCICU
Dr. Jim Turner, Office of Educator Certification
Mr. Reggie Dean, Principal, Camden High School
Dr. Nancy Turner, Principal, White Knoll Middle School
Dr. Therese Kuhs, Department of Education, University of South Carolina
Dr. Sharon Moore-Askins, School of Education, Francis Marion University
Dr. Tina Marshall-Bradley, Dean, School of Education, Claflin University
Dr. Edgar Taylor, Superintendent, Laurens County School District 55
Ms. Falicia Harvey, Office of Educator Certification, PACE
Mr. Jason Fulmer, CERRA
Dr. Paul Horne, Jr., Director, Curriculum & Program Review, SC Education Oversight Committee
Mrs. Hanicia Graham, Budget Officer, SC Education Oversight Committee

Institutions with Teacher Preparation Programs

Anderson University
Benedict College
Bob Jones University
Charleston Southern University
Claflin University
Clemson University
Coastal Carolina University
Coker College
College of Charleston
Columbia College
Columbia International University
Converse College
Erskine College
Francis Marion University
Furman University
Lander University
Limestone College
Morris College
Newberry College
North Greenville University
Presbyterian College
South Carolina State University
Southern Wesleyan University
The Citadel
USC- Aiken
USC – Beaufort
USC – Columbia
USC – Upstate
Winthrop University
Wofford College

Appendix C

Current Number of SC National Board Certified Teachers
Based on Score Reporting for December 2006

ᴀ Absolute Ratings for 2006
  ○ (E) = Excellent
  ○ (G) = Good
  ○ (A) = Average
  ○ (BA) = Below Average
  ○ (U) = Unsatisfactory
ᴀ Current Candidates: "retake" indicates number of Retake candidates included in total number of Candidates for district
ᴀ Local Incentives: 59 districts offer local incentives with 39 of those offering a one-time bonus or annual supplement (see pages 6 – 8 for more detail)

School District	*Current Candidates (2007-2008 Cycle)	*Current Candidates (2006-2007 Cycle)	Total Current Candidates In Process (Both cycles and including Retake Candidates)	TOTAL NBCTs (Through 2006 Score Release)	Total # of Teachers	% of Teachers who are NBCTs	LOCAL Incentives (see pgs. 6 – 8 for details)
Abbeville (A)	2	11 (7 R)	13	51	296.10	17.22	YES
Aiken (A)	14	31 (13 R)	45	81	1,753.20	4.62	YES
Allendale (U)	0	1	1	1	143.20	.70	NO
Anderson 1 (G)	24	7	31	66	550.50	11.99	YES
Anderson 2 (A)	0	9 (2 R)	9	24	237.30	10.11	YES
Anderson 3 (A)	0	1	1	19	192.30	9.88	NO
Anderson 4 (A)	0	12	12	14	215.40	6.50	YES
Anderson 5 (A)	5	18 (9 R)	23	99	979.40	10.11	YES
Bamberg 1 (A)	0	6 (2 R)	6	6	129.60	4.63	NO
Bamberg 2 (BA)	0	0	0	0	82.0	0.00	NO
Barnwell 19 (BA)	0	0	0	2	69.40	2.88	NO
Barnwell 29 (A)	0	2	2	1	74.50	1.34	YES
Barnwell 45 (A)	0	2 (1 R)	2	11	186.50	5.90	NO
Beaufort (A)	10	24 (3 R)	34	103	1,493.20	6.90	YES
Berkeley (A)	17	84 (37 R)	101	175	1,907.80	9.17	YES

School District	*Current Candidates (2007-2008 Cycle)	*Current Candidates (2006-2007 Cycle)	Total Current Candidates In Process (Both cycles and including Retake Candidates)	TOTAL NBCTs (Through 2006 Score Release)	Total # of Teachers	% of Teachers who are NBCTs	LOCAL Incentives (see pgs. 6 – 8 for details)
Calhoun (BA)	0	1	1	12	147.0	8.16	YES
Charleston (BA)	35	97 (36 R)	132	329.0	3,589.70	9.17	YES
Cherokee (A)	9	8 (3 R)	17	24	721.70	3.33	YES
Chester (BA)	4	13 (4 R)	17	46.0	469.70	9.79	YES
Chesterfield (A)	7	13 (5 R)	20	61	583.50	10.45	NO
Clarendon 1 (BA)	0	0	0	3	78.40	3.83	NO
Clarendon 2 (BA)	10	2 (2 R)	12	21	225.40	9.32	NO
Clarendon 3 (A)	1	1 (1 R)	2	10	82.80	12.08	NO
Colleton (U)	4	3 (1 R)	7	19	483.70	3.93	YES
Darlington (BA)	3	28 (14 R)	31	59	852.50	6.92	YES
Dillon 1 (BA)	0	0	0	1	64.80	1.54	NO
Dillon 2 (U)	1	1 (1 R)	2	15	236.10	6.35	YES
Dillon 3 (A)	0	0	0	4	111.0	3.60	NO
Dorchester 2 (A)	24	31 (9 R)	55	111	1,377.0	8.06	YES
Dorchester 4 (BA)	0	11	11	4	187.70	2.13	YES
Edgefield (A)	0	5 (3 R)	5	27	330.20	8.18	YES
Fairfield (U)	0	5 (3 R)	5	15.0	331.80	4.52	YES
Florence 1 (BA)	13	20 (12 R)	33	80	1,200.70	6.66	YES
Florence 2 (A)	1	2	3	5	91.10	5.49	NO
Florence 3 (U)	0	3 (3 R)	3	7	277.80	2.52	NO
Florence 4 (BA)	0	0	0	2	92.90	2.15	YES
Florence 5 (A)	0	6 (5 R)	6	19	107.80	17.63	YES
Georgetown (A)	7	45 (26 R)	52	104	806.80	12.89	YES
Greenville (A)	36	110 (32 R)	146	344	4,768.80	7.21	YES
Greenwood 50 (A)	7	33 (11 R)	40	71	706.30	10.05	YES
Greenwood 51 (A)	4	1	5	11	94.60	11.63	YES
Greenwood 52 (G)	0	0	0	7	115.10	6.08	YES
Hampton 1 (A)	5	1	6	18	208.90	8.62	NO
Hampton 2 (U)	0	0	0	4	108.70	3.68	NO

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School District	*Current Candidates (2007-2008 Cycle)	*Current Candidates (2006-2007 Cycle)	Total Current Candidates In Process (Both cycles and including Retake Candidates)	TOTAL NBCTs (Through 2006 Score Release)	Total # of Teachers	% of Teachers who are NBCTs	LOCAL Incentives (see pgs. 6 – 8 for details)
Horry (A)	50	110 (31 R)	160	173	2,625.0	6.59	YES
Jasper (U)	0	1 (1 R)	1	1	225.70	0.44	YES
Kershaw (A)	19	47 (12 R)	66	100	748.60	13.36	YES
Lancaster (A)	22	31 (9 R)	53	62	848.80	7.30	YES
Laurens 55 (BA)	8	10 (3 R)	18	16	402.30	3.98	YES
Laurens 56 (A)	5	11 (2 R)	16	12	243.40	4.93	YES
Lee (BA)	1	1 (1 R)	2	4	208.20	1.92	YES
Lexington 1 (E)	18	55 (16 R)	73	165	1,551.20	10.64	YES
Lexington 2 (A)	8	30 (17 R)	38	94	702.30	13.38	YES
Lexington 3 (A)	4	10 (3 R)	14	17	166.50	10.21	YES
Lexington 4 (BA)	3	12 (6 R)	15	24	249.0	9.64	YES
Lexington 5 (E)	13	58 (22 R)	71	252	1,273.0	19.80	YES
Marion 1 (U)	1	2	3	11	213.70	5.15	NO
Marion 2 (U)	5	0	5	3	136.50	2.20	YES
Marion 7 (U)	2	1 (1 R)	3	6	79.20	7.58	YES
Marlboro (BA)	2	3 (3 R)	5	20	382.40	5.23	YES
McCormick (BA)	1	0	1	4	80.0	5.00	YES
Newberry (BA)	13	18 (11 R)	31	42	495.30	8.48	YES
Oconee (A)	10	18 (6 R)	28	89	889.80	10.00	NO
Orangeburg 3 (U)	0	4 (4 R)	4	5	270.0	1.85	YES
Orangeburg 4 (BA)	3	2 (1 R)	5	10	305.30	3.28	YES
Orangeburg 5 (BA)	4	16 (4 R)	20	17	645.20	2.63	YES
Pickens (A)	6	24 (11 R)	30	99	1,138.0	8.70	YES
Richland 1 (BA)	55	94 (43 R)	149	197	2,248.30	8.76	YES
Richland 2 (A)	41	109 (40 R)	150	368	1,717.70	21.42	YES
*Saluda (BA)	1	1	2	2	158.20	1.26	NO
Spartanburg 1 (A)	1	8 (3 R)	9	19	387.50	4.90	NO
Spartanburg 2 (A)	2	26 (11 R)	28	52	572.0	9.09	YES
Spartanburg 3 (A)	0	6 (1 R)	6	20	221.0	9.05	NO

School District	*Current Candidates (2007-2008 Cycle)	*Current Candidates (2006-2007 Cycle)	Total Current Candidates In Process (Both cycles and including Retake Candidates)	TOTAL NBCTs (Through 2006 Score Release)	Total # of Teachers	% of Teachers who are NBCTs	LOCAL Incentives (see pgs. 6 – 8 for details)
Spartanburg 4 (G)	0	12 (5 R)	12	13	187.90	6.92	NO
Spartanburg 5 (A)	5	24 (7 R)	29	41	522.30	7.85	NO
Spartanburg 6 (A)	15	17 (5 R)	32	47	733.70	6.41	NO
Spartanburg 7 (BA)	3	11 (4 R)	14	52	736.30	7.06	NO
Sumter 2 (A)	0	12 (4 R)	12	19	650.40	2.92	YES
Sumter 17 (A)	4	33 (17 R)	37	52	655.50	7.93	YES
Union (BA)	0	9	9	15	368.0	4.08	NO
Williamsburg (BA)	0	1	1	5	416.80	1.20	YES
York 1 (A)	4	7	11	24	375.50	6.39	YES
York 2 (G)	6	29 (8 R)	35	46	436.20	10.55	YES
York 3 (A)	12	56 (18 R)	68	195	1,211.20	16.10	YES
York 4 (E)	12	23 (7 R)	35	111	584.70	18.98	YES

State-Supported Schools/Special Schools

School	*Current Candidates (2007-2008 Cycle)	*Current Candidates (2006-2007 Cycle)	Total Current Candidates In Process (Both cycles and including Retake Candidates)	TOTAL NBCTs (Through 2006 Score Release)	Total # of Teachers	% of Teachers who are NBCTs	LOCAL Incentives (see pgs. 6 – 8 for details)
Anderson AVC (E)	0	0	0	6	26.00	23.08	NO
Daniel Morgan Voc. (E)	0	0	0	5	21.00	23.81	NO
DJJ (E)	7	3	10	7	103.0	6.80	NO
FE Dubose (G)	0	0	0	2	12	16.67	NO
Felton Lab	0	1	1	0			
HB Swofford (E)	0	0	0	2	20.00	10.00	NO
John de la Howe (E)	0	0	0	3	14	21.4	NO
RD Anderson Tech					25.00	4.00	NO

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	611 as of May 2007	1,597 as of May 2007	2,208 as of May 2007	4,639 claimed by SC Districts and Special Schools	53,346.1 Based on SDE file	~8.67% of SC Teachers Based on SDE file	39 Districts Offering one time bonus or supplement	59 Districts Offering local incentives
(E)	0	0	0	1				
SC Governor's School for Arts (E)	0	1	1	13	37	35.14	NO	
SC School for Deaf & Blind (E)	2	2 (2 R)	4	6	89.9	6.67	NO	
Sumter County AVC (E)	0	0	0	1	12.00	8.33	NO	
Palmetto Unified (E)	0	0	0	0	63.70	0	NO	
Anderson Alternative	0	0	0	1	12.00	8.33	NO	
Greenwood AVC	0	0	0	2	23.00	8.70	NO	
TOTALS Based on information provided to CERRA by districts, SDE, NBCTs and NBPTS	611 as of May 2007 (Fall application window to open August 2007 – November 2007)	1,597 as of May 2007 (awaiting scores in December 07)	2,208 as of May 2007	4,639 claimed by SC Districts and Special Schools	53,346.1 Based on SDE file	~8.67 % of SC Teachers Based on SDE file	39 Districts Offering one time bonus or supplement	59 Districts Offering local incentives

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LOCAL Incentives in SC School Districts

ABBEVILLE: The Abbeville School District provides NBCTs with a $1,500 supplement.

AIKEN: The district offers one [1] professional leave day, candidate support and technical support.

ANDERSON ONE: The district provides an annual $1,000 supplement upon certification.

ANDERSON TWO: The district provides a one-time $1,000 bonus upon certification.

ANDERSON FOUR: The district provides a $3,000 salary supplement for the life of the certificate (pending annual board approval), $65 reimbursement for the online National Board registration fee, two [2] release/staff development days and ongoing training sessions.

ANDERSON FIVE: The district provides candidate support workshops and awareness sessions.

BARNWELL 29: The district offers technical support and professional leave time to take assessment center exercises.

BEAUFORT COUNTY: The Beaufort County School District provides NBCTs with a $2,000 annual salary increase for the ten-year life of the certificate.

BERKELEY COUNTY: The Berkeley School District pays an additional $5,000 to NBCTs who agree to teach in rural schools determined by the state to have the greatest needs. Up to two retake fees are provided as well. Candidate support workshops are provided by district NBCTs in addition to technical support.

CALHOUN COUNTY: The district provides NBCTs with a one-time $3,000 salary supplement upon certification.

CHARLESTON COUNTY: The Charleston County School District uses funds to support retreats and workshops for NBC candidates and bankers, stipends for NBCTs to conduct these activities, facilitator training and NBCT recognition events.

CHEROKEE COUNTY: The district offers one [1] professional leave day to candidates for portfolio/assessment preparation. In addition, the district provides awareness meetings and candidate support workshops throughout the school year.

CHESTER COUNTY: The district provides a $3,000 salary supplement upon certification, two [2] professional leave days, candidate support workshops and technical support including use of laptops and video equipment.

COLLETON COUNTY: The district offers candidate support workshops and technical support such as use of laptops and assistance with videotaping.

DARLINGTON COUNTY: The district provides a $2,000 salary supplement upon certification, two [2] professional leave days, payment for one banked entry, a tuition-free graduate class and opportunities to work with NBCTs.

DILLON TWO: National Board Certified Teachers receive a one time bonus of $1,000 during the initial year receiving National Board Certification.

DORCHESTER TWO: The district offers candidate support meetings.

DORCHESTER FOUR: The district provides awareness and candidate support meetings, one [1] professional leave day to candidates working on portfolio entries, laptop computer loan while pursuing certification and reimbursement for the registration fee.

EDGEFIELD COUNTY: The district offers graduate courses, candidate support groups and technical support.

FAIRFIELD COUNTY: The district provides NBCTs with a $4,000 salary supplement for the life of the certificate and three [3] professional leave days for candidates.

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FLORENCE ONE: The district offers a one-time $1,000 bonus upon certification and two [2] professional leave days for candidates.

FLORENCE FOUR: The district offers two [2] professional development days, pays a $300 reapplication fee and provides technical support including copying and videotaping.

FLORENCE FIVE: The district offers three [3] professional leave days for candidates. In addition, the district offers mentoring and workshops to candidates, as well as financial support to retakers.

GEORGETOWN COUNTY: The district offers a $3,000 salary supplement upon certification and provides candidate support retreats and two [2] professional leave days. In addition, the district will supplement one retake for retakers in 2005. Retreats and Workshops are ongoing.

GREENVILLE COUNTY: The district offers candidate support meetings for those seeking National Board Certification.

GREENWOOD 50: The district provides NBCTs with a $3,000 salary supplement upon certification.

GREENWOOD 51: The district provides NBCTs with a $1,500 salary supplement.

GREENWOOD 52: The district provides NBCTs with a one-time $450 upon certification.

HORRY COUNTY: The Horry County Board of Education approved a district supplement of $4,000 for National Board Certified teachers. The supplement will be phased in over two years with $2,000 being paid in 2005-06 and the full $4,000 being paid in 2006-2007.

JASPER COUNTY: The district provides NBCTs with a $1,500 salary supplement for the life of the certificate.

KERSHAW COUNTY: The district provides NBCTs with a $5,000 salary supplement.

LANCASTER COUNTY: The district pays for one retake fee, provides one [1] professional leave day, technical support and a recertification course for those interested in pursuing National Board Certification.

LAURENS 55: The district offers a $1,500 salary supplement upon certification.

LAURENS 56: Candidate support is provided through monthly meetings held by NBCTs in the district.

LEE: The district provides $500 to first year NBCTs. Each concurrent year, the district provides a $1000 supplement to NBCTs.

LEXINGTON ONE: The district provides NBCTs with a $3,000 salary supplement.

LEXINGTON TWO: The district provides an annual $3,500 salary supplement for the life of the certificate, support workshops throughout the year and awareness meetings for candidates.

LEXINGTON THREE: The district provides a $3,000 salary supplement upon certification and two [2] professional leave days for candidates.

LEXINGTON FOUR: The district provides a $3,000 salary supplement upon certification and two [2] professional leave days for candidates.

LEXINGTON/RICHLAND FIVE: The district provides NBCTs with a $5,000 salary supplement pending board approval and provides candidate support workshops and awareness meetings.

MARLBORO COUNTY: The district provides candidates two [2] professional leave days to work on the portfolio and a one-time $1000 salary supplement for NBCTs upon certification.

MARION TWO: The school district offers two [2] professional leave days, candidate support meetings and technical support.

MARION SEVEN: The school district offers mentoring and technical support as well as professional development days to assist candidates in their portfolio preparation.

MCCORMICK COUNTY: The school district provides NBCTs with a $1,500 salary supplement for the life of the certificate.

NEWBERRY COUNTY: Upon certification, teachers receive an annual $2,500 salary supplement for the life of the certificate. In addition, the district provides technical assistance, two [2] professional leave days, and monthly candidate support workshops with a NBCT instructor.

ORANGEBURG THREE: The school district provides NBCTs with a $3,000 salary supplement for the life of the certificate, candidate support workshops and technical support.

ORANGEBURG FOUR: The school district provides a $3,000 salary supplement upon certification.

ORANGEBURG FIVE: The school district provides NBCTs with a $3,000 salary supplement for the life of the certificate and candidate support sessions for those seeking National Board Certification.

PICKENS COUNTY: The school district offers two [2] professional leave days and candidate support meetings.

RICHLAND ONE: Upon certification, teachers receive an annual $5,500 salary supplement for the life of the certificate. In addition, the district pays fees for two retake exercises, provides candidate support workshops and awareness meetings.

RICHLAND TWO: The district provides a $5,000 annual salary supplement for the life of the certificate and provides candidate support workshops.

SPARTANBURG TWO: The district provides a tuition free graduate course for NBC candidates.

SUMTER TWO: The district provides candidate support meetings as well as technical support.

SUMTER 17: The district offers candidate support groups with the option to earn recertification points. A mini-conference conducted by District 17 NBCTs is provided free of charge for new candidates, candidates-in-waiting, and interested teachers. A minimum of two awareness meetings are held yearly.

WILLIAMSBURG COUNTY: The district provides a $3,000 supplement distributed over the first three years of certification as National Board teacher ($1,000 per year).

YORK ONE: The district provides assistance with the application process and continual technological support.

YORK TWO: The district awards a $1,000 supplement to teachers who receive NBC.

YORK THREE: The district provides an annual $3,000 salary supplement for the life of the certificate and offers repayment of the State loan for qualified bankers who do not achieve National Board Certification within three years.

YORK FOUR: The district provides a $3,000 salary supplement upon certification as well as extensive support groups for candidates. Some of these provide direct instruction on the various requirements of NB. Others are Help Sessions. Candidates earn renewal credits but it is no longer for graduate credit.

Please check with individual local education agency liaisons regarding candidate support and incentives as this list may not reflect recent developments.

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Appendix D

Minimum Salary Scale, 2007-08

Appendix E

South Carolina

State Minimum Salary Schedule

Current Findings and **Proposed Recommendations**

Prepared by

Teacher Salary Schedule Revision
Task Force

January 2006

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RATIONALE

According to the National Commission on Teaching and America's Future (January 2003), the mistaken belief that teacher supply is the real issue has misled needed efforts in developing and keeping highly qualified educators. Recent nationwide studies on teacher shortage have determined that "the real staffing problem is teacher retention."

Figures clearly show that the nation has substantially increased its supply of new graduates by 50 percent over the past decade. Unfortunately, America's schools are losing about the same number of teachers as they hire each year. In 2000 alone, 534,861 teachers were hired nationally while 539,778 teachers changed school districts or left the profession. The picture becomes even clearer when targeting beginning teacher attrition rates, which show an exodus rate of 33 percent after the third year and 46 percent by the fifth year.

The cost of teacher turnover is critical, both financially and in regards to student performance. Not only does the constant state of flux create a major disruption to the strength and continuity of the school community, high turnover rates lead to high concentrations of inexperienced, vulnerable novice teachers. Veteran teachers who are focused upon their own class loads become overburdened by the additional needs of their peers create working conditions that do not support adult learning or professional development necessary to meet the challenges of our teaching force. Tragically, the dividends of accomplished teachers and heightened student achievement are lost.

In South Carolina, statistics support national findings (i.e. 2004-05: 5,222 teachers departed while 6,486 were hired, 33 of which were new graduates). *(2004-05 Fall Teacher/Administrator Supply and Demand Survey, CERRA)*

MISSION

The Teacher Salary Schedule Revision Task Force was created in August 2005 under the direction of South Carolina Association of School Administrators (SCASA) in response to work initiated by the Personnel Division's Recruiting Action team. Its mission was to provide recommendations for revision of the state's Minimum Salary Schedule that would address the growing educator recruitment and retention problems in South Carolina.

The Task Force's scope of work was guided by the approved 2006 Legislative Platform, which includes under the Teacher and Principal Recruitment and Retention Position Statement: *Revise the State's teacher salary schedule to compensate educators for acquiring advanced knowledge and skills, assuming additional responsibilities, demonstrating exemplary performance, and teaching in hard-to-staff schools and subject areas.*

RESEARCH FINDINGS

SC State Minimum Salary Schedule

- The development of the State Minimum Salary Schedule most likely occurred in the mid-1940's around the time that the state required teacher certification. No written record was found. The original version provided incentives for education levels, grades (based on NTE scores), gender (males paid higher), and race (Caucasians paid higher). Changes made to the model included:

    - elimination of race and gender incentives (1950's)
    - elimination of NTE grade incentives (1970's)
    - addition of steps, 18-19 and 20-22, (2000 and 2001 respectfully)

    Discussions were held in 2000 regarding the elimination of the Master's +30 column. No official action was taken. A compromise was made requiring that coursework must be completed in seven years and that 21 hours must be in a specific content/certification area.

- Statute No. 163 (1977) called for the state minimum salary schedule to be based on the state aid teachers' salary index. In fiscal year 1979, the date of implementation, the 1.000 figure in the index was $8,750.

- In fiscal year 1985, the 1.000 figure in the index was $14,172. This figure was based on a 10.27% increase pursuant to the South Carolina Education Improvement Act (EIA) of 1984.

- Beginning with fiscal year 1986, the 1.000 figure in the index had to be adjusted on a schedule to stay at the southeastern average as projected by the Division of Research and Statistical Services and provided to the Budget and Control Board and General Assembly. The southeastern average is calculated based on a simple average of teachers' salaries of the southeastern states. The calculation of base teacher pay includes all local supplements and incentive pay. (Note: Original calculations of the southeastern average were based on a weighted average, and later changed in the mid-1990's to a simple average calculation.)

Recruitment and Retention

Fact: The cost of teacher turnover is severe, both financially and in regards to student performance.   American schools spend $2.6 billion annually replacing teachers. (1)

South Carolina	Teacher Hired	Teachers Leaving the Profession
2004-05	6,486.75	5,574
2003-04	4,828.75	5,196
2002-03	5,581.7	4,807

CERRA, Fall Teacher/Administrator Supply and Demand Survey
(2004-05, 2003-04, 2002-03)

Fact: This constant state of flux creates a major disruption to the strength and continuity of the school community. High turnover rates create high concentrations of inexperienced, vulnerable teachers. Veteran teachers become overburdened by the additional needs of their peers. And tragically, the dividends of accomplished teachers and heightened student achievement are lost. (2)

Fact: SC school districts are finding it increasingly more difficult to attract competent, dedicated teachers resulting in extreme shortages.
SC Teacher Vacancies: 2004-05 (9%), 2003-04 (8%)

Fact: According to federal statistics, 15.7 percent of teachers leave the profession every year, compared to an 11.9 percent average for all other professions - suggesting a strong link between teacher turnover and difficulties associated with hiring quality teachers. (3)

Fact: Salary schedules based on seniority (experienced-based) are not keeping pace with the rapidly changing environment of schools and are indirect indicators of knowledge and skills. (4) Today, rewards should be given to teachers for improving their own skills and knowledge and schools for demonstrating high achievement. In fact, the current salary schedule rewards a teacher who performs poorly at the same rate as a hard-working, highly effective teacher. (5, 6)

Fact: The factor that most discourages top talent from entering or staying in pubic education is the lack of career advancement opportunities. (7)

Fact: Teaching can be seen as a flat profession due to the fact that teachers essentially perform the same tasks throughout their career, with administrative positions often the only advancement in influence, level of responsibility, and salary. (8) Thus, by not addressing the need, SC's present system encourages our most committed, experienced, and accomplished teachers out of the classroom.

Fact: Compensation structures have been associated with wide worker acceptance, better employee morale, improved organizational performance, and higher salaries. (4)

Fact: Professional jobs deserve professional compensation. Raising the salaries of our educators sends a positive message about the value that SC places on public education and classroom teachers.

Fact: Compensation pay is a strong recruitment tool for SC. Better recruitment lends itself to better retention. (9) Likewise, better retention creates a solid foundation for greater talent recruitment and better working conditions.

Differential Pay Options (National Perspective)

The chronic shortage of teachers in high demand fields is nationwide. Many states are looking at differential pay based on expertise, performance, or market demands in an effort to attract more and better-qualified candidates. The following is a brief overview of current practices in selected states.

Arizona, Iowa, and New Mexico

All three states have systems in place that give teachers extra pay for classroom performance.

Denver, Colorado, ProComp

On November 1, 2005, voters in Denver approved a $25 million teacher pay-for-performance plan that will reward teachers for boosting student achievement. Under the plan, ProComp, educators will also receive bonuses for teaching in hard-to staff subjects and for teaching in high-need schools paid for by adding about $2 in property taxes for every $100,000 a home is worth. The increase will bring the total amount the city pays for teacher compensation to $225 million.

Florida, Maryland, Massachusetts

These states are currently looking at tying teacher pay to performance as well as lifting salaries for all teachers. In Massachusetts, Governor Mitt Romney is expected to outline the specifics of his education reform plan in his State of the State address in January. The education reform legislation calls for such things as the addition of 1,000 math teachers and a $5,000 bonus for the state's best teachers.

Georgia

Georgia ranked 15th in the nation for its average teacher salary of $45,848 in 2003-04, according to the American Federation of Teachers' (AFT) annual teacher salary survey, released in October 2005. In addition, Georgia ranked 6th in the nation for average beginning teacher salary, at $35,116, an increase of 3.4 percent from 2002-03. (Note: South Carolina was 28th, at $41,162)

Milken, TAP (Teacher Advancement Program)

Arkansas, Louisiana, Minnesota, Oklahoma, and South Carolina use money from the Milken Foundation for teacher development programs that lead to higher salaries.

North Carolina

To help recruit and retain teachers, Governor Mike Easley has announced plans to incrementally raise the average teacher salary schedule from last year's $43,313 to about $52,296, the projected national average by 2008-09. Money earmarked by the legislature will cover this $75-month increase and projected revenue will handle the remaining raises. In addition, pay for NBPTS is built into the salary schedule providing teachers with a 12% increase to their current rate.

Texas

In Texas, Governor Rick Perry ordered the state's first incentive-pay program for teachers. The $10 million plan will reward teachers who succeed in economically disadvantaged schools.

RECOMMENDATIONS

General

- Increase funding in order to raise the annual average teacher salary in South Carolina to the average of North Carolina and Georgia.

- Include in the Minimum Salary Schedule differential pay options for poverty, critical need subject areas, mentoring, and National Board Certification either by multipliers, line item, or column.

- Increase the number of steps on the Minimum Salary Schedule to 27, by annually funding an additional step for the next six years.

Differential Pay Options

- Continue to provide $7,500 annually to teachers who are certified by the National Board for Professional Teaching Standards.

- Provide $2,000 to teachers who serve as mentors and meet all qualifications and training requirements as outlined in the state's Mentoring and Induction Guidelines approved by the State Board of Education in July 2005.
  (http://www.scteachers.org/index.cfm)

- In addition to step increases, grant lump sum longevity bonuses of $3,000 to educators employed in South Carolina public schools after every five years of service instate as identified by the following PCS codes: 03-08, 10, 11, 17 & 18 starting after year 10.

- Increase base pay of educators teaching in a State Board of Education approved critical needs subject area by a specified index as determined by the school district's free and reduced lunch percentage.

- Increase base pay of educators teaching in hard to staff schools by a specified index as determined by the school district's free and reduced lunch percentage.

TALKING POINTS

GENERAL RECOMMENDATIONS

(1). Increase funding in order to raise the annual average teacher salary in South Carolina to the average of North Carolina and Georgia.

- Competition for highly qualified teachers is critical; especially from bordering states whose average teacher salary is currently well-above South Carolina's. North Carolina's Governor Mike Easley has announced plans to incrementally raise the average teacher salary to $52,206 in an effort to recruit and retain teachers. Each year South Carolina delays raising its average teacher pay, more teachers will be lured to higher paying positions in bordering states.

- Increasing the average teacher salary in South Carolina will greatly address teacher shortages, particularly in high-demand fields such as science, math, and special education. Higher pay sends the message that educators are valued in South Carolina. Tragically, if the trend of slight to no pay increases continues, teaching will have a more difficult time reaching parity with the pay of other professions.

- The impending election year gives our state the opportunity to shine a spotlight on the improvement of schools through the development of stronger, more effective teachers who are supported in their formative years.

- Higher pay will encourage the best and the brightest to commit to enter into the profession. Traditional teacher preparation programs continue to face competition from other disciplines because the status, working conditions, and compensation for teachers continue to lag behind other fields.

- Increasing the average teacher salary in South Carolina will provide schools and students with sufficient numbers of skilled teachers. In addition, this increase will be essential to keeping teachers from leaving the profession and ensuring that those who are prepared remain in the classroom for a long period.

- Historical research has revealed that South Carolina's teacher salary schedule has not been revised in 30 years. Revisions since its creation in the 1940's have included eliminating pay differential for race, gender, and test scores. Pay schemes based almost exclusively on seniority are simply inappropriate and counter-productive for school systems that face a constant need to adapt and improve with a rapidly changing environment. Today, attention must be given to looking at differential pay options in South Carolina that attract and retain the best and the brightest teachers.

- In the past three years, severe teacher shortages in South Carolina have been addressed by hiring international teachers. Statistics indicate that the number of international teachers hired in South Carolina has increased from 30 in 2003 to 323 in 2005. While the hiring of international teachers provides a solution to filling immediate vacancies, it brings cultural, and financial challenges to a growing shortage problem.

- Teacher responsibilities and accountability continue to increase. Implementing a new compensation system with differential pay options would lead to better teacher morale and improved organizational performance.

- Establishing a new pay system without adequate funding would lead to its failure. In addition, uncertainty about funding long-term leads teachers and teacher prospects to be skeptical of the leadership of our profession resulting in heightened retention and recruitment problems in South Carolina.

(2). Include in the Minimum Salary Schedule differential pay options either by multipliers, line item, or column.

- The current system provides pay increases for years of experience and educational/university degrees and coursework. These variables are indirect indicators of knowledge and skills. This system assumes that teachers with more education units and more experience in the classroom have developed a greater professional expertise. Furthermore, many of the credits used as a basis for salary increases are loosely connected to teaching responsibilities and challenging subject-matter instruction.

- Meeting all of the requirements of an effective compensation system promotes equity, rationality, competitiveness, retention, job performance, responsiveness, and career growth.

- Inclusion of differential pay options in the teacher pay system establishes market-driven compensation based in part on the demand for their services, skills, and knowledge.

- Devising a minimum salary schedule that offers teachers differential pay options and the chance to earn relatively higher salaries would provide teacher advancement without leaving the classroom.

- Increasing the base pay of educators teaching in an approved critical needs subject area or hard to staff school by a specified index as determined by the school district's free and reduced lunch percentage assists all school district s in recruiting and retaining teachers.

- Providing differential pay options, some in part based on the free and reduced lunch percentage for school districts, assists all schools in recruiting and retaining highly qualified teachers as defined in the No Child Left Behind Act federal guidelines.

- Adding additional differential pay options provides teachers with more than two ways to increase their salary.

(3). Add additional steps to the Minimum Salary Schedule up to 27 years.

- Currently, the salary schedule does not reward teachers financially for staying in the profession beyond 22 years and prior to retirement.

- Leveling off salaries at a time when teachers are highly skilled sends the message that quality service is not valued.

- Teachers lose the two percent annual incremental pay for each year of service after 22 years in the profession.

NATIONAL BOARD FOR PROFESSIONAL TEACHING STANDARDS

- Currently SC ranks third in the number of National Board Certified Teachers (4,443) and second in the number of African American NBCTs.

- In 2001-2002, when incentives were created for this advanced certification, the number of National Board Certified Teachers in South Carolina increased from 361 to 1,291.

- Various studies indicate that National Board Certified Teachers help students achieve larger testing gains, are particularly effective with students who have special needs *(CBA Miami-Dade 2004)* and, on average, students of National Board Certified Teachers scored as if they had received more than a month's worth of additional instruction *(Arizona State University 2004).*

- The National Board for Professional Teaching Standards was created by national professional education organizations and accomplished classroom practitioners at the national level (National Council of Teachers of English and the National Middle School Association, for example); therefore the standards are embedded with the nation's most rigorous content knowledge and pedagogy.

- A salary supplement for National Board Certification encourages outstanding teachers to stay in the classroom.

- The number of teachers pursuing National Board Certification has leveled off in the past two years resulting in stabilization of funding.

- Teachers should be rewarded for improving their own skills, guiding their own professional development, and gaining new knowledge and abilities.

- The National Board Certification process establishes ongoing and continuing professional development, which has a direct impact on student achievement.

  (Note: Teacher comments regarding National Board Certification can be found in the Appendix.)

MENTORING

- American schools spend $2.6 billion annually replacing teachers. *(Alliance for Excellent Education, Straight A's, Volume 5, No. 11, June 6, 2005)* It is estimated that districts spend about $11,000 to replace a teacher (School's Out, *Edutopia*, Claudia Graziano, Feb/March 2005).

- This constant state of flux creates a major disruption to the strength and continuity of the school community. High turnover rates create high concentrations of inexperienced, vulnerable teachers. Veteran teachers become overburdened by the additional needs of their peers. And tragically, the dividends of seasoned teachers and heightened student achievement are lost. (*No Dream Denied*, National Commission on Teaching and America's Future, January 2003)

- National data indicates that teachers without sustained induction support provided by a trained mentor leave the profession at a rate of almost 70 percent higher than those who receive it. (National Center for Education Statistics, USDE, Washington, D.C., 2000).

- In South Carolina, statistics support national findings (i.e. 2004-05: 5,222 teachers departed while 6,486 were hired, 33% of which were new graduates). (2004-05 FallTeacher/Administrator Supply and Demand Survey, CERRA)

- In July 2005, the South Carolina Mentoring and Induction Program Implementation Guidelines were approved calling for standardization of mentor credentials, training, and responsibilities. Currently, 28 states have state-level teacher induction programs – only 10 states have mandated them and provide funding (Recruiting New Teachers, non-profit organization – Mildred Hudson, CEO, Belmont, Mass.)

- Tailoring support to new teachers is widely confirmed by research, which states that "one size does not fit all" for induction and ongoing professional development for all teachers.

- Mentoring improves the skills and knowledge of both the new and veteran teacher and increases the likelihood that both will be retained in our profession.

- Research supports mentoring as being the number one strategy for addressing retention. Nationally, a growing number of effective mentoring programs have been implemented. With the state's newly adopted Mentoring and Induction Program Implementation Guidelines, timing is excellent for the inclusion of differential pay for mentors.

- Mentoring programs contribute in a positive way in helping new teachers have the skills they need to be successful in raising student achievement.

LONGEVITY BONUSES

- Longevity bonuses tie salary increases to work experience in South Carolina public schools.

- Bordering states like North Carolina, which is one of South Carolina's greatest competitors, is already providing longevity bonuses starting with years 10-14.

- Providing financial incentives for staying in the profession should lead to lower attrition rates statewide.

- Lower attrition rates result in a more stable school culture with the end result of higher student achievement.

- Providing longevity bonuses sends a strong message to educators and the general public that the teaching profession is valued in South Carolina.

- Longevity bonuses would encourage administrator retention easing critical shortages currently experienced in South Carolina.

- Longevity bonuses reduce the need for signing bonuses, which improves teacher retention in a specific school district.

CRITICAL NEED SUBJECT AREAS

- Paying all teachers alike virtually guarantees shortages by field.

- High salaries for critical need subject areas would encourage prospective teacher candidates to consider these teaching shortage areas.

- Some teacher preparation programs in South Carolina have to eliminate programs in critical need subject areas due to low enrollment. Additional stipends may encourage higher entrance numbers and preserve these needed teacher preparation programs.

- Providing differential pay for critical needs subject areas based on the free and reduced lunch percentage for school districts will assist all schools in recruiting and retaining highly qualified teachers as defined in the No Child Left Behind federal legislation guidelines.

- Shortages in critical need areas force districts to hire growing numbers of out-of-field teachers and substitutes. Increasing the number of highly qualified teachers in these teaching areas will directly impact student achievement.

HARD TO STAFF SCHOOLS

- Teacher quality is one of the most important factors in student success. Statistics reveal that vacancies and turnover rates are higher in hard to staff schools. Most hard-to-staff schools serve low-income communities with larger percentages (20 percent compared to 15.7 percent - national average for percentage of teachers who leave the profession annually) of children at risk of failure or dropping out. It is these school communities that have the most urgent need for attracting and keeping highly-skilled and motivated teachers.

- Increasing the base pay of educators teaching in a hard to staff school by a specified index as determined by the school district's free and reduced lunch percentage assists all school district s in recruiting and retaining teachers.

- Hard to staff schools are often unable to match salaries, benefits, and amenities. As a result, they cannot be as selective and often have to accept higher levels of out-of-field teachers and substitutes.

- Rewarding teachers for teaching in hard to staff areas encourages statewide retention.

- Overall student achievement will rise statewide by addressing low achieving/hard to staff schools.

APPENDICIES

Glossary of Terms

Critical Need Subject Areas are determined annually by the number of teaching positions available that are vacant or filled with candidates not fully certified in the particular subject area.

Hard-to-Staff Schools are those that have an insufficient supply of effective teachers (teachers who can successfully promote student learning) for all students, including high-poverty and minority students. Hard-to-staff schools are characterized by a(n):
- Large percentage of socioeconomically disadvantaged students
- Difficult teaching environment
- Undesirable school location
- Low academic achievement of student population.

Professional Certified Staff (PCS) System is a web-based system used by district staff to report staff information such as salary, position, days employed, and location to several State Department of Education offices.

Simple Average

The simple average is the sum of all three states (South Carolina, North Carolina, and Georgia) divided by three.

State	Average Salary
SC	$42,000
NC	$44,000
GA	$47,000
	$133,000 ÷ 3 = $44,333

Simple Average: $44,333

Weighted Average

The weighted average is the sum of dollars divided by the number of teachers.

State	Average Salary	# of teachers	
SC	$42,000	46,000	$1,932,000,000
NC	$44,000	75,000	$3,300,000,000
GA	$47,000	100,000	$4,700,000,000
	$133,000	221,000	$9,932,000,000

Weighted Average: $44,941.18

Teacher Comments on National Board Certification

Gail Bienstock, School Counselor

I believe that holding what we do under a microscope and being accountable for outcomes is a growth experience for each and all of us. On a personal level, it helped me be more respectful of the incredible challenges each of our teachers face daily when I make suggestions on our student assistance team.

The validation that comes through support and direction so readily given by peers was also a growth experience. I'm used to being the giver because of my role, so was very grateful for the many members of our faculty and staff, and of the entire RD2 community who reached out to be supportive. It gives a whole new level of meaning to "collaborative." As for reaching out to the next line of candidates, I've already started that process, and will continue, with hopes that each new generation joins until we can truly mentor 1:1 with someone whose style allows the greatest benefit from the mentoring.

Cheryl Guy, Social Studies

As a veteran teacher, NB gave me the professional development opportunity to reflect on and improve strategies that make teaching and learning effective. The process also caused me to research best practices and to continue to improve teaching and learning in my classroom.

Arlene Bakutes, English/Language Arts

NB process encourages reflection and that is the real reward for teachers. This reflection benefits a teacher's classroom performance.

Christi McCollum, Elementary

National Board process taught me how to really be a reflective teacher and look at the practices I use in the classroom and to question why I do what I do and how it impacts the students I teach. It taught me to question my practices and never use a strategy simply because it is one I am comfortable with, but to find strategies that lead my students to success even if that means stretching myself to think out of the box.

I am a more effective educator having completed the National Board process. Teaching is not simply about content. It is about understanding the core propositions of National Boards and being able to internalize them and apply them every moment of every day with every child I encounter.

Penny Wendt, Instructional Technology Specialist

Because it had been many years since I had been in school, the NB process caused me to go back and revisit many of the content areas related to my profession. As a result, I feel I am more up to date on many of the issues related to my profession.

ENDNOTES

(1) Alliance for Excellent Education, *Straight A's*, Volume 5, No. 11, June 6, 2005.

(2)   National Commission on Teaching and America's Future, *No Dream Denied*, January 2003.

(3) Hull, Jonathan Watts, *"*Filling the Gaps." Threshold, Exploring the Future of Education, Spring 2004, pp. 8-11.

(4) Kelley, Carolyn and Allan Odden. Consortium for Policy Research in Education, Financial Briefs: *Reinventing Teacher Compensation Systems*, September 1995.

(5) Lankford, Hamilton, Susanna Loeb, and James Wyckoff. 2002. "Teacher Sorting and the Plight of Urban Schools." Education Evaluation and Policy Analysis. Vol. 2 No.1, pp. 37-62.

(6) Stinebrickner, Todd. 2001. Á Dynamic Model of Teacher Labor Supply." Journal of Labor Economics, Vol. 19 No.1 (January), pp.196-230.

(7) Milliken, Lowell. 2000. A Matter of Quality: A Strategy for Assuring the High Caliber of America's Teachers, Milliken Family Foundation, Santa Monica, California, pp. 6-21.

(8) Ferriter, William and John Norton. "Creating a Culture of Excellence." Threshold, Exploring the Future of Education, Spring 2004, pp. 18-21.

(9) Levin, Jessica and Meredith Quinn. "Missed Opportunities: How we Keep High-Quality Teachers Out of Urban Schools." The New Teacher Project, September 2003.

EDUCATION OVERSIGHT COMMITTEE

Subcommittee: <u>Public Awareness Subcommittee</u>

Date: <u>October 8, 2007</u>

REPORT/RECOMMENDATION
Provide an update of the the work of Parents and Adults Inspiring Reading Success (PAIRS), from February 2007 to September 2007.

PURPOSE/AUTHORITY
The preamble to the EAA, calls for the "acceptance of the responsibility for improving student performance and taking actions to improve classroom practice and school performance by the Governor, the General Assembly, the State Department of Education, colleges and universities, local school boards, administrators, teachers, parents, students, and the community" (Section 59-18-100).

CRITICAL FACTS
As part of the EOC's objective to strengthen the teaching of reading, Parents and Adults Inspiring Reading Success (PAIRS) began in February 2005. PAIRS is designed to provide the catalyst to encourage and support the achievement of grade level reading literacy for every child in South Carolina.

The following report summarizes the work of the initiative from February 2007 to September 2007, organized around the purposes outlined in the bylaws.

TIMELINE/REVIEW PROCESS
Ongoing

ECONOMIC IMPACT

> **Cost:**

> **Fund/Source:**

ACTION REQUEST

☐ **For approval**   ☒ **For information**

ACTION TAKEN

☐ **Approved**   ☐ **Amended**

☐ **Not Approved**   ☐ **Action deferred (explain)**

Parents and Adults Inspiring Reading Success (PAIRS) Success Update

Submitted to Education Oversight Committee, October 2007

<u>Overview</u>
Launched in February 2005, Parents and Adults Inspiring Reading Success (PAIRS) is a project of SC's daily newspapers and is administered as a public awareness initiative of the SC Education Oversight Committee.

The mission of PAIRS is to encourage and support the achievement of reading literacy on grade level for every child in South Carolina. With an intense focus on grades three through eight, the initiative seeks to energize broad collaboration and involvement in local communities (ie., extended learning opportunities, mentoring programs, faith-based programs, literacy initiatives, etc.)

As outlined in the initiative's bylaws (Appendix A), the guiding principles of PAIRS follow:
- Reading is essential for success in school and life.
- Young people learn best when nurturing, caring adults provide motivation and support.
- The future of all South Carolinians depends on our ability to help our students reach their potential.

The purposes are
1. to identify and recruit affiliate organizations promoting reading and literacy among adults and young people;
2. to facilitate connections between affiliate organizations, providing them support to enhance their individual missions;
3. to promote opportunities that support the creation of new reading programs;
4. to develop communication, marketing, and research materials; and
5. to support activities involving reading and literacy statewide.

The initiative emerged as a result of "Conversations with the EOC" in every county of South Carolina, held from September 2003-April 2004. These meetings identified a critical need for all citizens to actively reinforce and support the mission of schools, particularly in the area of reading. The three areas of identified consensus formed the guiding principles of the initiative, which are listed above.

The need for PAIRS was reinforced in 2005 when research showed an almost one-to-one correlation between reading proficiency and on-time high school graduation. South Carolina ranks last among states in graduation rates, graduating only 48 percent of 9th graders in four years.[1]

In 2004, only 27 percent of 5th graders and 25 percent of 7th graders scored Proficient on the Palmetto Achievement Challenge Test (PACT), meaning they are well-prepared for work at the next grade level. Many of these students do not acquire the reading skills they need to prepare

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[1] The high school graduation variable was defined as the percent of the 1999-2000 9th grade 135 ADM who received diplomas (does not include those receiving certificates) three years later in 2002-2003. http://www.scpairs.org/PDF/Harry_Miley_Exec_Summary.pdf.

them for graduation and beyond. The research suggests that only half of those in the ninth grade today will ever graduate from high school.

The study also showed that for every ten additional students we can help to reach reading proficiency on the PACT, at least eight will graduate. A large part of a student's success in the classroom depends on their contact with adults who encourage and inspire them to read outside of the classroom. Providing a catalyst by which greater awareness is placed on literacy and the importance of adult/child relationships is at the heart of the PAIRS initiative.

<u>Update to PAIRS Two-Year Status Report</u>
In February 2007, the EOC approved the submission of the *PAIRS Two-Year Status Report*. The report summarized two years of work of the initiative. It was organized around the purposes outlined in the bylaws and also outlined future directions for the initiative. The following report updates the committee on the progress of the initiative from February 2007 to September 2007.

Purpose 1: to identify and recruit affiliate organizations promoting reading and literacy among adults and young people.
Affiliate membership in PAIRS is open to not-for-profit programs and individuals who concur with the mission and goals of PAIRS and act to implement the mission and goals. Programs and individuals who meet criteria are open to join PAIRS as Affiliate members. The cost of membership is free and EOC/PAIRS staff keeps signed commitment statements on file.

Currently, there are 103 PAIRS Affiliates, an increase of seven programs since February. Fifty-eight affiliates are programs and 45 are individual members. Currently, 22 counties have met the stated goal, which is to have two affiliates in each county. In February, 20 counties had met the goal. A breakdown of the affiliates by county is attached in Appendix B.

The Advisory Board, which advises and supports PAIRS implementation statewide and in local communities, is composed of 16 individuals, who represent the publishers of the 16 daily newspapers. These individuals meet quarterly. Current advisory board members are: Steven Brandt, *Greenville News*; Henry Haitz, *The State*; Anthony Summerlin, *Union Daily Times*; Valerie Canepa, *Rock Hill Herald*; Milton Miles, *The Sun News;* Kim Buckner-Land, *Spartanburg Herald-Journal*; William Collins; *Greenwood Index-Journal*; Larry Tarleton, *Charleston Post and Courier;* Cathy Hughes, *Orangeburg Times and Democrat;* Joni Weerheim*, Seneca Daily Journal;* Fred Foster*; Anderson Independent-Mail;* Jack Osteen, *Sumter Item; and* Scott Hunter*, Aiken Standard.* Mark Laskowski, Publisher of the *Florence Morning News*, and Beth Patton, Marketing Director at the *Island Packet/ Beaufort Gazette,* have recently joined the Advisory Board. In June, the *Bluffton Today* newspaper began daily publication; PAIRS staff is working to recruit Larry G. Miller, Publisher of the two-year old paper, to join the advisory board.

Purpose 2: to facilitate connections between affiliate organizations, providing them support to enhance their individual missions.
Connections and partnerships continue to be critical to the success of PAIRS. Partnership in PAIRS is open to organizations with a commitment to literacy and with whom a formalized relationship would benefit PAIRS Affiliate programs, or organizations with similar or overlapping services.

Current, active partners include the SC Afterschool Alliance, Harvest Hope Food Bank, SC Center for Children's Books and Literacy, University of South Carolina School of Library and Information Science, SC State Library, Allen University, and the African Methodist Episcopal (AME) Church, SC 7th Episcopal District.

The South Carolina Center for Children's Books and Literacy (SCCCBL) is an outreach program of the *University of SC School of Library and Information Science*. It is designed to enhance existing literacy programs, provide literacy research specific to South Carolina, and train teachers and daycare workers, parents and others. Recently, a letter (Appendix C) was sent out to the leaders of all Rotary Clubs around the state, offering a program with a message from PAIRS staff and the staff of the SC Center for Children's Books and Literacy. Literacy is a key component of the mission of Rotary International and as outlined in the invitation to rotaries, the program has three main objectives: 1.) provide information on the relationship between literacy and success in school, life, and economic development; 2.) instill a sense of urgency about the importance of literacy at each stage of a child's life; and 3.) challenge Rotarians as individuals and as an organization to utilize their influence and resources to act and assist the students of South Carolina.

The partnership with PAIRS with *Allen University* and the *SC 7th Episcopal District of the AME Church* on the *Allen Reading Initiative* is not currently in operation. Dr. Wanda Fernandopulle, the Director of the Initiative, resigned from Allen in November 2006, and since that time the school has not been involved in the support of the 14 AME churches involved in the initiative's pilot. The programs continue to be supported as PAIRS Affiliate programs, receiving resources related to the literacy component of their programs.

Although staff of the daily newspapers compose the Advisory Board of the initiative, they also partner and provide to the affiliate programs. For example, PAIRS Affiliate programs have benefited from free class subscriptions to *The State* paper on two occasions. *The State's* Newspapers in Education (NIE) program offers class sets of newspapers to public school classrooms to be used for educational purposes. They have recently seen the benefit of offering these resources to out-of-school time programs. NIE staff have also offered to provide free training to affiliate staff on using the newspaper as a learning tool for all grade levels.

Purpose 3: To promote opportunities that support the creation of new reading programs.
In October 2005, the publication *How to Start an Effective Out-of-School-Time Program in South Carolina* was published as a project of PAIRS and the South Carolina Afterschool Alliance (SCAA). The guide is an excellent resource for individuals wanting to start a program or enhance an existing program. Literacy resources are included within the guide. Since publication of the guide, PAIRS staff has tried to develop training to accompany it with staff of the SC Afterschool Alliance. Lack of staff at the SCAA has consistently presented a barrier in keeping the trainings from occurring. In September 2007, the SCAA will double their staff by adding two staff persons to serve as regional coordinators.

Purpose 4: To develop communication, marketing, and research materials.
In addition to the aforementioned program with the SC Center for Children's Books and Literacy, PAIRS staff has continued the publication of the quarterly *Connections* newsletter.

In May, PAIRS staff began a moderated listserv for affiliates to communicate with one another. The listserv is hosted by the SC Chief Information Office (CIO) and can be accessed online at the PAIRS website, www.SCPAIRS.org.

Staff from PAIRS and the SC Afterschool Alliance (SCAA) are also working collaboratively to bring *Afterschool Academies* to South Carolina this year and offer it to PAIRS Affiliates and individuals within the SCAA network. The *Academies* program offer programming and practice in the core approaches and methods of effective extended learning time education. Funding is provided by the Charles Stewart Mott Foundation.

Staff is also working with partners on the potential of using ETV resources to offer literacy related professional development to PAIRS Affiliates online. Out-of-school time program staff and child care providers often do not have the time to attend workshops during the week or weekends – these types of "accessible-anytime" activities would be beneficial to providers.

Purpose 5: To support activities involving reading and literacy statewide.
In May 2007, a follow-up to the successful "Summer Reading" supplement pilot was published. The goal of the supplement was to showcase the power of great books, particularly during the summer months, and to reach students and adults in the community who interact with students.

This year's supplement was published in six daily newspapers: *Florence Morning News, Myrtle Beach Sun News, Orangeburg Times and Democrat, Seneca Daily Journal, Union Daily Times,* and *Spartanburg Herald-Journal.*

Details of the distribution of the supplement include:

- 228,000 total copies of the "Summer Reading" inserts were printed. Total circulation in the daily newspapers was 189,881.

- The EOC investment was identical to the investment made in the 2006 pilot project. Each of the six participating newspapers printed their own supplement at their own print shops and invested money in the production of the project. *The Florence Morning News* handled the printing and distribution of the overrun copies.

- 300 copies of the "Summer Reading" inserts were distributed to school district offices statewide, for use in summer school. Each shipment contained an order form so that districts needing additional copies could order directly from *The Florence Morning News.*

- Each of the PAIRS Affiliates received 50 copies of the "Summer Reading" insert.

- 50 Summer Reading sections were delivered to every public library in the state.

- 5,000 additional copies of the supplement were printed for additional requests.

- A teacher's guide to the supplement was provided free of charge to educators upon request.

This fall, PAIRS staff will work with representatives from the SC State Library, University of SC School of Library and Information Science, and Newspapers in Education (NIE) staff from around the state to consider partnering and increasing the effectiveness of this project in 2008.

Appendixes

Appendix A

By-Laws of Parents and Adults Inspiring Reading Success (PAIRS)

Article I: Name

The name of the organization is Parents and Adults Inspiring Reading Success, hereafter referred to as "PAIRS".

Article II: Mission and Purpose

The mission of PAIRS is to encourage and support the achievement of reading literacy on grade level, with an intense focus on grades three through eight for every child in South Carolina by energizing broad collaboration and involvement in local communities (ie., extended learning opportunities, mentoring programs, literacy initiatives, etc.)

The guiding principles of PAIRS shall be:
- Reading is essential for success in school and life.
- Young people learn best when nurturing, caring adults provide motivation and support.
- The future of all South Carolinians depends on our ability to help our students reach their potential.

The purposes of PAIRS shall be:
1. to identify and recruit affiliate organizations promoting reading and literacy among adults and young people;
2. to facilitate connections between affiliate organizations, providing them support to enhance their individual missions;
3. to promote opportunities that support the creation of new reading programs;
4. to develop communication, marketing, and research materials; and
5. to support activities involving reading and literacy statewide.

Article III: Advisory Board

Section 1: The Advisory Board shall consist of one elected chair, as well as appointed members as described in Article III. The Chair will be elected annually among board members at the last board member of the calendar year.

Section 2: The Advisory Board shall advise and support PAIRS implementation statewide and in local communities.

No member of the PAIRS Advisory Board, or newspapers, shall derive any personal profit or gain, directly or indirectly, by reason of his or her participation with PAIRS. Each individual shall disclose to the PAIRS Advisory Board any personal interest which he or she may have in any matter pending before the PAIRS Advisory Board and shall refrain from participation in any decision on such matter.

Section 3: The PAIRS Board should be composed of the Publishers of South Carolina's daily newspapers.

Section 4: The Advisory Board shall advance the purpose of PAIRS directly or through its designees.

Section 5: The PAIRS Advisory Board shall meet at least twice a year, in person or by way of telephone conference.

Section 6: Bylaws may be amended at any board meeting by a majority of those present.

Article IV: Organization

Section 1: PAIRS is administered by the SC Education Oversight Committee (EOC).

Section 2: An appointed Advisory Board shall advise and support PAIRS implementation statewide and in local communities.

The PAIRS Advisory Board is composed of the Publisher from each of the daily newspapers in South Carolina. If the Publisher is not able to participate, a senior staff member shall be designated.

Section 3: The street address of PAIRS is: 1105 Pendleton Street, Blatt Building, Suite 227, Columbia, SC 29211

Article V: Affiliates and Partners

Section 1. *Affiliate Membership* in PAIRS shall be open to not-for-profit programs that concur with the mission and goals of PAIRS and act to implement the mission and goals.

PAIRS Affiliate members must pledge that their represented group does not discriminate based on the basis of race, color, national origin, religion, sex, or handicap in its practices related to employment or establishment and administration of its programs and initiatives.

Affiliate Meetings. There shall be one General Membership Meeting (e.g., PAIRS Summit) per year, at the time, place, and discretion of the Advisory Board.

Section 2. *Partnership in PAIRS* is open to organizations:
1. with a commitment to literacy and with whom a formalized relationship would benefit PAIRS Affiliate Programs (e.g., Allen University, USC);
2. with similar or overlapping services (e.g., SC Afterschool Alliance)

Section 3. *Associate Status* in PAIRS is open to organizations:
1. with services or products which would benefit PAIRS Affiliates.

Participation does not constitute an endorsement by PAIRS. The PAIRS Advisory Board must approve all partnerships and requests for Associate Status.

Current dated 6/20/05

Appendix B

County	No. Affiliates	No. Individual Affiliates	Met Goal	
Abbeville	0	0	N	
Aiken	1	0	N	
Allendale	0	0	N	
Anderson	0	0	N	
Bamberg	0	0	N	
Barnwell	1	1	Y	
Beaufort	3	3	Y	
Berkeley	0	0	N	
Calhoun	1	0	N	
Charleston	3	2	Y	
Cherokee	0	0	N	
Chester	0	0	N	
Chesterfield	0	0	N	
Clarendon	3	3	Y	
Colleton	1	1	Y	
Darlington	0	0	N	
Dillon	2	2	Y	
Dorchester	1	1	Y	
Edgefield	0	0	N	
Fairfield	0	0	N	
Florence	1	12	Y	
Georgetown	3	1	Y	**Total # of Affiliates: 58**
Greenville	10	0	Y	**Total # of Individual Affil: 45**
Greenwood	2	0	Y	
Hampton	0	0	N	**Total: 103**
Horry	0	0	N	
Jasper	2	5	Y	**Counties Met Goal: 22**
Kershaw	2	0	N	**Counties Not Met Goal: 24**
Lancaster	0	0	N	
Laurens	0	0	N	
Lee	0	0	N	
Lexington	3	2	Y	
Marion	2	2	Y	
Marlboro	0	0	N	
McCormick	0	0	N	
Newberry	0	0	N	
Oconee	0	0	N	
Orangeburg	1	1	Y	
Pickens	1	0	N	
Richland	10	6	Y	
Saluda	0	0	N	
Spartanburg	1	1	Y	
Sumter	2	1	Y	
Union	0	0	N	
Williamsburg	2	1	Y	
York	0	0	N	

current 9/18/07

Appendix C

August 3, 2007

Name
Rotary Club
Address 1
Address 2
City, State, Zip

Dear Salutation:

How can we assist young people today reach their full potential and become successful members of society? As a Rotarian, you understand the importance of bringing clarity and understanding to this question and how community volunteerism fits into the answer.

The leadership of Rotary International has consistently recognized literacy as a critical component to individual success. A call to action is necessary in our state. Unfortunately, fewer students graduate on-time in our state than in any other state in the nation. Many South Carolina students are not reading at the level necessary to complete high school, to be successful in school and life -- and to experience the enjoyment of being life-long readers and learners.
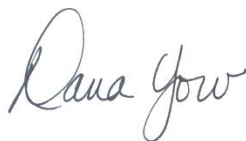
Research studies document a correlation between reading proficiency and on-time graduation. Student success is higher when out-of-school activities reinforce and extend learning acquired in school. South Carolina's young people need reinforcement in reading initially and critically as they encounter more demanding material.

Parents and Adults Inspiring Reading Success (PAIRS), a public awareness initiative of the SC Education Oversight Committee, directed by the publishers of South Carolina's 16 daily newspapers, and the South Carolina Center for Children's Books and Literacy at the University of South Carolina, have a message we would like to share with Rotary groups around the state. Our 20-minute presentation has three objectives:

        (a) Provide information on the relationship between literacy and success in school, life and economic development;
        (b) Instill a sense of urgency about the importance of literacy at each stage of a child's life; and
        (c) Challenge you as an individual and as an organization to utilize your influence and resources to act and assist the students of South Carolina.

Please contact one of us if your group is able to work us into your program schedule. Our contact information is listed below under our signatures.

Sincerely,

Dana Yow   Ellen Shuler

Dana Yow   Executive Director
Director of Communications   SC Center for Children's Books and Literacy
Education Oversight Committee / PAIRS   Phone: 803-734-8207
Phone: 803-734-6164   shulere@gwm.sc.edu
Danay@eoc.sc.gov
Ellen Shuler

Launched in February 2005, *Parents and Adults Inspiring Reading Success (PAIRS)* is a project of SC's daily newspapers and is administered as a public awareness initiative of the SC Education Oversight Committee. The mission of PAIRS is to encourage and support the achievement of reading literacy on grade level for every child in South Carolina. With an intense focus on grades three through eight, the initiative seeks to energize broad collaboration and involvement in local communities (ie., extended learning opportunities, mentoring programs, faith-based programs, literacy initiatives, etc.)

The South Carolina Center for Children's Books and Literacy (SCCCBL) is an outreach program of the *University of SC School of Library and Information Science.* It is designed to enhance existing literacy programs, provide literacy research specific to South Carolina, and train teachers and daycare workers, parents and others.

The *SC Education Oversight Committee* is an independent, non-partisan group made up of 18 educators, business persons, and elected leaders who are appointed by the General Assembly. Created in 1998, the committee is dedicated to reporting facts, measuring change, and promoting progress within South Carolina's education system.

EDUCATION OVERSIGHT COMMITTEE

Subcommittee: <u>None</u>

Date: <u>September 19, 2007</u>

<u>REPORT/RECOMMENDATION</u>
Adoption of objectives for 2007-2008

<u>PURPOSE/AUTHORITY</u>
SECTION 59 6 10. Appointment of committee.

 (A) (1) review and monitor the implementation and evaluation of the Education Accountability Act and Education Improvement Act programs and funding;
(2) make programmatic and funding recommendations to the General Assembly;
(3) report annually to the General Assembly, State Board of Education, and the public on the progress of the programs;
(4) recommend Education Accountability Act and EIA program changes to state agencies and other entities as it considers necessary.

SECTION 59 6 110. Duties of Accountability Division.
(1) monitor and evaluate the implementation of the state standards and assessment;
(2) oversee the development, establishment, implementation, and maintenance of the accountability system;
(3) monitor and evaluate the functioning of the public education system and its components, programs, policies, and practices and report annually its findings and recommendations in a report to the commission no later than February first of each year; and
(4) perform other studies and reviews as required by law.

<u>CRITICAL FACTS</u>
Each year the EOC establishes annual objectives to guide the work of the EOC and to allocate resources in a priority manner. These draft objectives arose from discussions at the August 14-15 meeting. An initial draft was sent to EOC members in late August. After receiving comments, the first draft of objectives was revised to yield the documet before the EOC today.

<u>TIMELINE/REVIEW PROCESS</u>
August - September 2007

<u>ECONOMIC IMPACT</u>

    Cost: EOC Operating: $1,363,370;   CDEPP: 398,000; Public Awareness: $226,392; Family Involvement: $47,000

    Fund/Source:
EIA

<u>ACTION REQUEST</u>

☒ **For approval**   ☐ **For information**

ACTION TAKEN

☐ **Approved**   ☐ **Amended**

☐ **Not Approved**   ☐ **Action deferred (explain)**

DRAFT OBJECTIVES FOR 2007-2008
September 5, 2007

1. Continue the implementation of the Education Accountability Act of 1998 and fulfill other responsibilities assigned by the General Assembly, including those within the Teacher Quality Act, the Parental Involvement in Their Children's Education Act, the Education and Economic Development Act and the early childhood development pilot program proviso and those made by special requests, including
    - Establishing a goal for high school graduation to include reporting data for different student groups and the inclusion of fifth year graduates; and
    - Conducting a comparative examination of ratings methodologies including simulations with the Measures of Academic Progress (MAPS) assessments.

2. Provide analyses and recommendations to achieve the 2010 goal by increasing the return on investment in education through the following:
    - Determining the assignments of NBPTS-certified teachers; their availability to work in high poverty settings and their impact on student achievement;
    - Working with school administrators and teacher preparation institutions to understand the differences between the competence level of the teacher graduate and the competence level needed in the classroom;
    - Emphasizing the need for valid and reliable data on student performance to guide improvements in policy and practice at the middle grades;
    - Convening a stakeholder effort to define the instructional technology infrastructure needed in our classrooms;
    - Following the progress of the Palmetto Priority Schools; and
    - Advocating for public choice innovation schools.

3. Increase partnerships among those who invest in South Carolina's schools by:
    - Convening informal meetings among the Governor, the State Superintendent of Education, the leadership of the legislative education committees, the State Board of Education, the Commission on Higher Education, the South Carolina Technical College System and First Steps;
    - Continuing to employ formal and informal advisory groups representing parents, educators and business and civic leaders;
    - Providing information for and connections among those building community infrastructure in support of higher student achievement; and
    - Collaborating with informal education providers to encourage extended learning programs sponsored by civic, community and faith-based groups.

4. Increase the impact of communications to focus attention on achievement of the 2010 goal and heighten awareness of the value of educational achievement for all South Carolinians.